

**These Minutes are Pending Board Approval**

**Mission Statement:** *"We are a community of learners. We will do whatever it takes to learn. We are building a strong foundation by believing we can, working our plan, then feeling the power of success."*

**George Washington Academy**  
**Thursday, May 18, 2023**  
**7:30 p.m.**

**Board Meeting Minutes**

**Location:** George Washington Academy  
2277 South 3000 East  
St. George, Utah  
Library

*The Board Training was held at 7:00 p.m. prior to the Board Meeting.*

*The Board meeting convened at 7:30 p.m.*

**Board Welcome:** Shannon Greer, President

**Roll Call:** Shannon Greer, President

**Prayer:** Amanda Mortenson

**Pledge of Allegiance:** Blake Clark

Board Members Present: Shannon Greer, Amanda Mortenson, Blake Clark, Casey Unrein, and Holly Myers. Shauna Mahoney attended via Zoom.

Board Members Absent: Kevin Peterson absent due to family matters.

Others Present: Deborah Odenwalder, Chance Manzanares, Debbie Kuavaka, Christine Giles, Jaycee Rogers, Nellie Rogers, Kim Townes, Lanessa Stevens, Jocelyn Larkin, Jaxynn Smith, Sharon Moss, Amber Corkin, Ayelen Butler, and Alisha Madsen. Spencer Adams and Aubrey Johnson attended via Zoom.

Shannon Greer thanked Alisha Madsen and Jaycee Rogers for their service to GWA. Board members gave their appreciation and thanks as well. Jaycee relayed to the board her appreciation for GWA and the board. Shannon also reports that she has a gift for Kevin Peterson and will drop it off at his house.

**- 5 minute recess to allow for refreshments -**

**Approval of Minutes:** Amanda Mortenson motioned to approve the minutes from the April 27, 2023 Board Meeting as found in the board packet. Casey Unrein seconded.. The motion passed

unanimously. All present voted in favor: Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney.

**Public Opportunity to Address the Board:**

None

**Set time for adjournment:** Blake Clark set time for adjournment at 9:05 p.m.

**Teacher Representative Report:**

Kindergarten: We completed all of our classicals and WIGs this year and the children loved celebrating this year. I have just completed my first year at GWA and I could not be happier. This school has been so amazing, so supportive and I'm so happy to have made the switch over. Thank you for your support of the teachers. 3rd grade: We just had our leadership day. Monday we'll do our book reports. We were able to do our planned field trip. 4th Grade: I would say as a team our biggest success was making intentional connections with the students to make them feel valued. Academically, I think our biggest success was with reading fluency. We had a lot of growth this year and quite a few students who were able to graduate from the reading center. 5th Grade: We think our biggest success was successfully following our ELA essential standards and having the grade as a whole perform really well and meet our goal on RISE. I think our other success this year was improving moments to make them more memorable. 6th Grade: We have had some big successes this year. We've been very successful at creating data-driven Tier II groups and providing meaningful interventions in Math and ELA. We have also created opportunities for extensions in areas like STEM, Story Making, Drama and Innovation where students have had more hands-on learning experiences. These experiences have been particularly impactful as students get put in the roles of leaders in the classroom by leading their small groups in STEM or innovation activities and writing their own scripts to perform in drama. We also have felt particularly successful in our community-building efforts. We have been holding weekly class meetings where students get to share what is going on in their lives. Students are also able to discuss issues important to them and share ideas and support for those students who feel they need some help or advice. This has led to an increased feeling of community in our classrooms and creates empathy for other classmates. We love our 6th graders! 7th Grade: From Rachelle: Our students have improved an average of 10 words per minute, 97% of our students type above 35 wpm, which is the 7th-grade standard. Our fastest student during a recent contest was able to get 100 wpm. Rise Scores: I don't have concrete data on that, but I believe we have made improvements by a few points from the scores last year (6th grade) to this year (7th grade).

**Administration Report:** Blake went over the student data including absences, overtime by staff, etc. Blake moved onto the assessment data he'd prepared, explaining which numbers were GWA versus State average. Blake states that this comparison sheet is the most valuable as we are able to look at cohort to cohort as they go through the school. Teachers are able to utilize these charts as they prepare their unit plans for next year. Starting with the ELA chart, the students are progressing nicely or staying in that same realm nor are they falling behind. The math assessment, which is the focus on the summer PE days this year and Blake has a few questions he will ask the teachers. Blake has brainstormed with the leadership team and they may have an

idea but he's excited to get teacher input to develop a unit essential standard for next year. Blake addresses the anomaly of 6th grade Math scores being significantly lower in both GWA and the State Average scores. He reports that the scores get bumped back up in 7th grade and though the 7th grade teachers report that the scores were higher than last year, that wasn't the case. However, Jocelyn clarified that the teachers were reporting the improvement was seen from the scores of 6th grade to 7th grade which is true. It's the 2nd year of the new math program and the staff is really diving in. Blake is going to talk with the teachers about scaffolding the course material and not lowering the expectation. Regarding Science, it is historically our highest score whereas Math used to be before the State standards changed. In some areas our science scores are better than they ever have been. Blake reports that the staff are doing really well with that. Two summers out is when they will focus on science. Crimson View elementary is the highest performing school for science in the entire state and they've been working with them and will continue to work with them. Their teachers are trained to teach the other teachers in the district and Blake has already asked Adam Baker if GWA could be a part of their training program. A new teacher from the district who has received this training has been a great resource to GWA teachers. Shannon expressed surprise on the Math scores but says that it can take 3-4 years to adjust when changes occur. Blake agrees that it takes time but explains how they are working to facilitate the program better to help the students with achieving those goals. Amanda asked if any other schools made the transition between programs at the same time and if so do their scores are similar to ours. Lanessa Stevens reports that she wasn't aware of any at the same time. Shannon expressed interest in how GWAs scores reflect against other schools in the area to make sure we're still the school of choice. Blake also reports that even though our demographic of our school has changed dramatically yet our scores have stayed consistent. Holly asked how detailed is the data that make up these reports and is it easy to determine if there are gaps in grades. Blake explains how Blake utilizes the data that he gets back how he detailed it is. Holly asks, were there any surprises? Blake reports that though there are always a few anomalies because a standard test is stressful so there's room for error but no surprises. Amanda asked about how GWA addresses those students that are lower on the scores so that they're not falling behind more each year. Blake explains how Patriot time can be used to address this as the student moves forward. Shannon asked if there were any surprises for Blake. Blake says he was surprised that the Math scores weren't higher but that looking back on conversations he was able to see some red flags that could have contributed to the scores. Blake reports on Leadership Day, 7th Grade, and Kindergarten Graduation. Shannon asks Blake to report on what went well this year next time.

**Financial Report:** Only 2 months left in the Fiscal Year and everything is looking good. This month's report compared to last month's report, overall our net income has increased by about \$95,000 dollars with a big chunk of that being our local revenue. We continue to see an increase of interest on our investments. Looking at what the Board approved on that line at the beginning of the year compared to the forecast right now and we're up about \$220,000. Overall we've seen good revenue. For overall expenses, we are doing better than we should be doing if you are looking at the even distribution. When the Board meets next month, there will be several changes on the Financial Summary as the Financial community goes through and true up some of the expenditures before the board final approval of the final budget. We're looking good and nothing is foreseen that would derail or cause issues to where we are right now. . Holly asks if it is possible to change the Enrollment table to better reflect the enrollment range however retracted

comment when Blake explained that the number that Holly thought was the max wasn't actually the max. Shannon notifies the Board that the Board will need to approve the budget for the next school year in the June Board meeting. Shannon requests that Board members review the budget when it comes in the Board packet and submit their question right away so that they can be addressed. Spencer reported on the Fraud Risk Assessment and explained how it helps schools understand its risk for potential fraud and to help put safeguards in place. Each month this will be looked at and then it will be reported on to the Board prior to the end of Fiscal year end. After approval, this report will be submitted to the State Auditor's website. Shannon expressed that she believed this is a good process to prevent issues. Shannon asked if Spencer was able to review her responses to the email that he sent to her. He confirmed that he did and that the response answered his questions. Casey commented that the CFO line was signed by Spencer Adams and asked if Kevin Peterson should have been the one to sign it. Spencer explained that it depends on how we want to do it but both are able to sign it. Shannon states that she would feel more comfortable if it was signed by Kevin as it would ensure that a board member looked at it. The board agreed that going forward that this form will be signed by the Board CFO however, Shannon will ascertain if Kevin is able to sign it before preventing this report being submitted. If Kevin isn't able to, then the Board will accept Spencer's signature on the form as it is currently.

#### **Committee Reports:**

- **Policies Committee** – Nothing to report. There will be in the future, just waiting on model policies and further instructions.
- **Finance Committee** – Several revisions made guided by where they see actuals going. Interest is up tremendously as Spencer reported.
- **Benefits Committee** – Nothing to report.
- **Curriculum Committee** – Nothing to report. Shannon thanks Lanessa's services to the committee. Casey asked about the Exit Interviews changes to address Curriculum institutional knowledge loss. Lanessa reported on the changes that are being made to prevent this loss. Shannon expresses that even if a previous teacher left materials/information for the next teacher, they won't always know how to use them so these measures will hopefully help to assist the new teacher as well.
- **Outreach Committee** – Holly shared the timeline for GWA Outreach projects and showed a powerpoint with the Board. She advises if the Board has questions outside of this discussion to contact a member of the Outreach committee. Holly expressed that this timeline is a rough draft and is likely to change depending on several factors. Fall of 2025 and Fall of 2026 are big focuses. Fall 2026 will be GWA's 20th anniversary celebration which they hope to use as a way to express that GWA is established and proven. Fall of 2025 possible American Principles Academy opening. We want to be proactive and not reactive to the new school opening. Summer 2023 will be looking at adding 14 pole flags to visually reinforce the culture of student leadership. Blake adds that the flag designs are rough drafts and will be taking these designs to the student body and staff to get input and advises input from board members is welcome. They will be updating the Lettering that will refresh and update outside of the building. This updating will include changing existing lights instead of backlighting the letters. They are also looking at adding a Digital Marquee to provide a more dynamic messaging. It will establish GWA as here to stay and will replace the existing marquee. The white piece represents the Washington memorial and lights up at night. Due to the new logo being currently under review the



Marquee would wait until the logo is finalized. Holly showed the current logo and invited the Board members to give input as they move forward on the designs. The location will move to the side of the property that borders 3000. The location is necessary due to the large power poles. Casey asked if the screen and logo will be visible on both sides of the Marquee which Holly confirmed. Blake reported on the differences on screen quality but it's the opinion currently to have the lower quality screen as per the type of content that will be displayed. Shannon asks how the committee is planning on paying for it. Blake reports that it would be out of the general budget. Outreach asks for any suggestions for the 20th Anniversary Celebration. Shannon suggests a Gala. Holly offers ideas that they have already considered including t-shirts, lanyards, stickers, etc. Shannons also suggested inviting alumni and founders. Amanda asks what the intention of this 20th anniversary celebration is. Holly explained as to why the committee is focusing on these changes including the 20th century. Amanda asked if we survey the parents that are leaving. Blake and Shannon affirmed that GWA does as parents are willing. Casey thanked Holly for her work that she put into her presentation and gave his suggestions on the celebrations.

- **Technology Committee** – Nothing to report.
- **LAND Trust Committee** – Nothing to report.
- **PTO Committee** – Amanda Mortensen, thanked for all the help from the Board in the family night. Received a lot of positive feedback from the parents/families. Estimated turnout was 900. Shannon asked if they are still needing any volunteers still for Field day. Amanda reports they are needing some more volunteers for the Field day and how we can sign up.
- **Board Development Committee** – Nothing to report. Next month we're going to a Conference. Couple from our school will be presenting.
- **Campus Management Committee** – Nothing to report. Blake reports that there will be a time that 3000 will be closed but they won't do that until we have another way to access the parking lot through the new construction. Current estimates are for August.

#### **Discussion and/or Action Items:**

- **Expenditures over \$5,000**
- **Black & White Mural Wall (Board Packet Pg. 16)** Holly Myers made a motion to accept the proposal for the additional wall mural not to exceed \$6,462.40. Amanda Mortenson seconded. Shannon asked where this mural would be going. Blake was able to describe its location to the board and confirmed that it would finish the existing mural. Casey asked why there wasn't a third quote. Blake explained that other vendors were not willing to work on a different vendor's previous work or charged significantly higher than the proposed vendor. The motion passed unanimously. All present voted in favor: Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney.
- **Removal of Dumpster area for Relocation (Board Packet Pg. 19)** Casey Unrein made a motion to approve the removal of the Dumpster and accept the Sunroc quote in the amount of \$14,389.38. Holly seconded. Casey expounded on the financial committee work on choosing this quote. Shannon asked if the finishing of the cinder blocks and Blake said that it was included in the price. Holly asks if the gate will be reused but Blake explains that the gate will not be workable in the new location. Shannon asked if the new

location was big enough and Blake reported that the previous location was just too big. Blake reports that this will be done in June. The motion passed unanimously. All present voted in favor: Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney. Blake also reports that our light poles will not get power until the street is finished on that side of the property.

- **Computer Replacement (Board Packet Pg. 25)** Holly Myers made a motion to accept the bid from Superior Technical Solutions in the amount of \$9, 446.90. Amanda Mortenson seconded the motion. Shannon notes that the funds for this will be coming from Land Trust funds. Casey asked about the increase by 2 computers instead of rolling over funds from the Land Trust. Blake explains that if we roll over too much then we'll get a red flag as it's supposed to be in the 1 to 2 % range. Holly explained how the computers were chosen. The motion passed unanimously. All present voted in favor: Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney.
- **Policy 310 - Student Dress Code (Board Packet Pg. 31)** Amanda Mortenson made a motion to accept Policy 310 - Student Dress Code as outlined in the Board packet. Holly Myers seconded. Casey asked about the Uniform Drop-Off program. Amanda confirmed that the program is continuing with drop off days occurring next week and in June. She also explained how the program works and how the clothes are used. Shannon calls for a vote. Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney voted in favor. Shannon Greer voted against. The motion passed.
- **Audit Committee and Appointment Discussion (Board Packet Pg. 36)** Casey Unrein gave background on the Audit Committee need and utilization. Casey states that it should go to the policy committee for approval and Shannon agrees. Shannon asked for Casey's recommendations. Casey recommended that the Audit committee would not be from the financial committee. Holly asked what GWA current Audit committee. Shannon explains that it's currently the Financial committee. Shannon asks if there are any volunteers for the committee. Amanda asked how frequently does this committee meet. Casey clarified that it would be quarterly. Shauna reported that she would be willing to be on the committee. Shannon asks Casey what he thinks the next steps are. Casey reports that he needs to meet with the policy committee again one more time for the description of the committee. They will come back to the Board where 2 members will be appointed. Board agreed with the recommendation progression. No vote necessary for this and will vote on it in June. Casey will get additional information to the Board Clerk to be added to the documents for the June Board meeting.
- **Updated Mission Statement (Board Packet Pg. 42)** Amanda Mortenson made a motion to approve the updated Mission Statement as shown in the Board packet. Shauna Mahoney seconded the motion. Blake reported why the current Mission statement should be updated. He reported that the students and teachers were a part of updating the Mission statement and read what was developed from that process. Shannon asked how the teachers were given a voice. Blake explained the specific processes that they used. Holly asked if the Operational statement was going away. Blake reports that he thinks that there should just be one not two as we currently have. Holly states that a part of the purpose of the Mission statement is to explain who we are, what we do, and why we do it. Blake validates her point. Amanda asks how this would support where we want to take the school into the future. Holly and Shauna express the desire to have more time with it before making a decision. Casey feels that this needs move action in it. Casey expresses

that GWA is changing the world and the proposed statement doesn't feel like it expresses it. Casey expresses the desire that the Board have had a bigger role in this decision. Shannon explains the role of the Board on the Mission and how this proposal came to the Board didn't allow for the Board to be a part of this process. Blake proposes that this be discussed during the summer Board retreat and expresses the opinion that though this may not currently meet what the Board wants but that the mission statement does need to change. The board discussed where the current one came from and the thoughts that went into it. Shannon recommends that the Board should be given the opportunity to discuss items before items are brought before the Board. Board agreed to table this decision to allow for discussion in the Outreach committee and Board Retreat in July. Shannon suggests that the Board Retreat be focused on the back lot and this mission statement. Holly requests that the Board emails her feedback on the mission statement to assist the Outreach committee. Shannon asks the Board clerk to email a reminder to Board Members asking for feedback to be sent to Holly by next Friday. Holly expresses appreciation for having the students say the mission statement daily. Casey asked if changing the Mission statement would affect the Charter. Shannon confirmed and reports that the Board can change the charter. Blake stated we will need to anyway due to the other policy changes being made. Board will address changing the Charter in the Fall. Amanda Mortenson called to table this discussion/vote and Shauna Mahoney agreed.

- **Special Education Executive Level Secretary (Board Packet Pg 43)** Holly Myers made a motion to accept the proposal for the position of the Special Education Administrative Level Secretary to be compensated on a salary basis. Amanda Mortenson seconds. Holly asked how long these overtime hours had been occurring. Shannon answered how long ago we had been tracking this information.. Holly asked if we had the date prior to this point and Shannon explained that it wasn't being tracked prior. Holly asks if we have a way to forecast what the special education population will be. Blake explained that there isn't a way to predict that. Casey reported on concerns that were brought up by the financial committee which were that if this person is already working overtime how does this change address that and how will we ensure that this person isn't overworked. Shannon and Blake were able to address those concerns. This person will be able to have more flexibility in work schedule and that if work were to increase then we'd have the opportunity to hire another person hourly part-time. Holly asked what happens if our numbers drop down. Shannon and Blake that due to state averages it is not likely to happen but also explain what options GWA would have. The motion passed unanimously. All present voted in favor: Shannon Greer, Amanda Mortenson, Holly Myers, Casey Unrein, and Shauna Mahoney.

**Closed Meeting** – none.

**Reconvene** — Take all appropriate action in relation to closed session items.

**Next Meeting:** The next regular Board Meeting will be held on June 22nd, 2023 at 7:30pm. Blake Clark will not be in attendance for the June Board Meeting.

**Adjournment:** The board adjourned at 9:54 p.m. Holly Myers motioned to adjourn. Motion carried.

Written by Deborah Odenwalder, Board Clerk

DRAFT



# Financial Summary

as of May 31, 2023

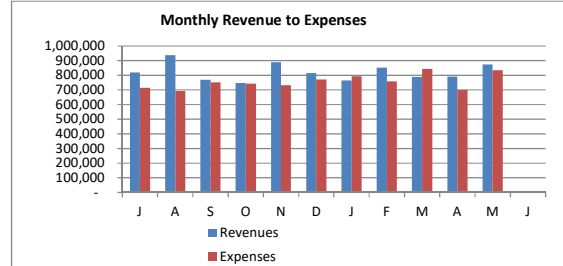
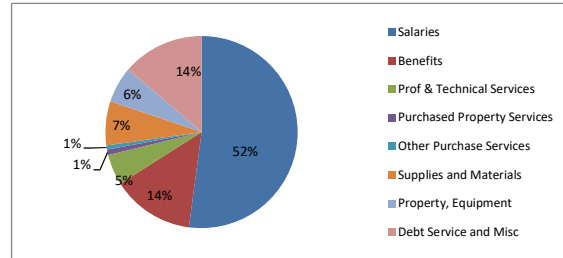
91.7% through the Year

## BUDGET REPORT

Green - more than 5% ahead of forecast  
 Yellow - within 5% of forecast  
 Red - more than 5% behind forecast

	Year-to Date Actuals	Approved Budget	Forecast	% of Forecast
Enrollment	1013	1010	1005	
<b>Revenue</b>				
1000 Local	\$ 491,663	\$ 226,049	\$ 520,091	95%
3000 State	\$ 8,313,727	\$ 8,618,679	\$ 9,098,601	91%
4000 Federal	\$ 278,913	\$ 463,667	\$ 504,986	55%
<b>Total Revenue</b>	\$ 9,084,303	\$ 9,308,395	\$ 10,123,678	90%
<b>Expenses</b>				
100 Salaries	\$ 4,447,588	\$ 4,853,645	\$ 5,068,674	88%
200 Benefits	\$ 1,161,013	\$ 1,286,490	\$ 1,353,244	86%
300 Prof & Technical Services	\$ 431,780	\$ 424,167	\$ 500,723	86%
400 Purchased Property Services	\$ 74,109	\$ 84,000	\$ 86,280	86%
500 Other Purchase Services	\$ 49,562	\$ 68,300	\$ 68,300	73%
600 Supplies and Materials	\$ 634,679	\$ 655,797	\$ 722,200	88%
700 Property, Equipment	\$ 368,124	\$ 342,800	\$ 592,964	62%
800 Debt Service and Misc	\$ 1,142,796	\$ 1,334,713	\$ 1,334,713	86%
<b>Total Expenses</b>	\$ 8,309,651	\$ 9,049,911	\$ 9,727,097	85%
<b>Net Income from Operations</b>	\$ 774,652	\$ 258,484	\$ 396,581	195%
Operating Margin	8.5%	2.8%	3.9%	

## EXPENSES

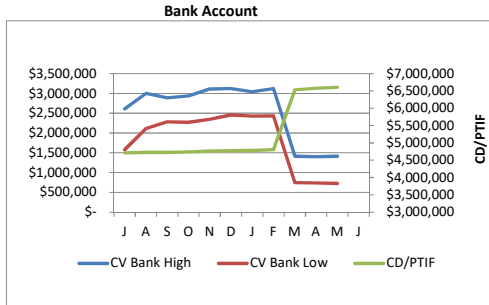


## RATIOS

	Actual	Goal	Covenant	Prior Mth Change
Operating Margin	3.9%	5%		0.6%
Debt Service Coverage	1.31	1.25	1.05	0.05
Days Cash on Hand	301	130	30	1
Building Payment %	13.2%	< 22%		0.0%

## CASH

Month Ending Cash Balance	\$ 8,022,492	Includes \$6,607,671 PTIF
Days Cash on Hand	301	



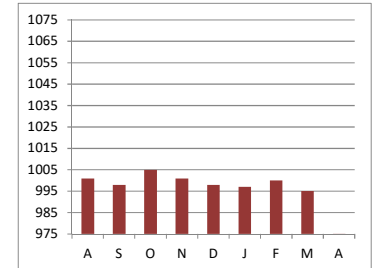
## RESERVES

	Actual Ytd	Forecast
Last Year Reserve Balance	\$ 5,841,739	\$ 5,841,739
Reserves Added this Year	\$ 774,652	\$ 396,581
Project 1	\$ -	\$ -
<b>New Reserve Balance</b>	\$ 6,616,391	\$ 6,238,320

## ENROLLMENT

	A	S	O	N	D	J	F	M	A
K	127	129	133	134	135	133	134	134	
1	133	132	130	129	129	129	130	129	
2	140	140	141	140	140	140	140	137	
3	140	140	140	137	138	137	138	136	
4	123	120	122	121	119	121	121	122	
5	131	131	132	133	133	133	133	132	
6	108	107	108	108	106	105	105	105	
7	99	99	99	99	98	99	99	100	
<b>Total</b>	1001	998	1005	1001	998	997	1000	995	0

WPU 862.51



Created by Red Apple





# Budget Detail Report

Actuals as of: **May 31, 2023**

Percentage of Year: **91.7%**



	(1013 Students)			(1010 Students)			1005		% Change From Prior Mth
	FY22 Actuals	Current Yr Actuals	Approved Budget	Changes	Forecast	% of Forecast			
<b>Revenue</b>									
1000 Revenue From Local Sources									
1510 Interest	\$ 36,256	\$ 222,417	\$ 33,500	\$ 222,500	\$ 256,000	86.9%	18.2%		
1600 Food Services	\$ 33,519	\$ 218,341	\$ 175,000	\$ 43,341	\$ 218,341	100.0%	14.6%		
1741 Student Activities and Fees	\$ 8,332	\$ 1,953	\$ 6,000	\$ (4,000)	\$ 2,000	97.7%	7.3%		
1741 Textbook and Library Fees	\$ 229	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
1920 Donations	\$ 11,497	\$ 14,778	\$ 6,349	\$ 8,429	\$ 14,778	100.0%	1.1%		
1920 GWA Gives Back	\$ 5,009	\$ 1,289	\$ -	\$ 1,289	\$ 1,289	100.0%	28.9%		
1920 Background Checks	\$ 1,496	\$ 1,230	\$ 1,200	\$ 30	\$ 1,230	100.0%	0.0%		
1920 Staff Lounge	\$ 2,723	\$ 2,359	\$ 3,000	\$ -	\$ 3,000	78.6%	0.0%		
1920 Principal Discretionary	\$ 162	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
1920 Dixie Direct Fundraiser	\$ -	\$ 8,480	\$ -	\$ 8,558	\$ 8,558	99.1%	-9.9%		
1930 Sales of Assets	\$ 6,573	\$ 14,895	\$ 1,000	\$ 13,895	\$ 14,895	100.0%	1773.6%		
1990 Miscellaneous Income	\$ 5,319	\$ 5,921	\$ -	\$ -	\$ -	0.0%	0.0%		
<b>Total 1000:</b>	<b>\$ 111,115</b>	<b>\$ 491,663</b>	<b>\$ 226,049</b>	<b>\$ 294,042</b>	<b>\$ 520,091</b>	<b>94.5%</b>	<b>20.2%</b>		
3000 Revenue From State Sources MSP									
30-3005 Regular School Program K	\$ 277,873	\$ 267,157	\$ 297,672	\$ (6,228)	\$ 291,444	91.7%	10.0%		
30-3010 Regular School Program 1-12	\$ 3,011,210	\$ 2,903,646	\$ 3,226,515	\$ (61,558)	\$ 3,164,957	91.7%	9.9%		
30-3020 Professional Staff	\$ 230,673	\$ 201,927	\$ 226,817	\$ (7,724)	\$ 219,093	92.2%	9.3%		
31-1205 Sped Educ Reg Add-On WPLUS	\$ 358,660	\$ 414,092	\$ 372,386	\$ 79,350	\$ 451,736	91.7%	10.0%		
31-1210 Sped Educ Reg Self Contained	\$ 31,022	\$ 36,974	\$ 31,025	\$ 9,310	\$ 40,335	91.7%	10.0%		
31-1220 Sped Educ Extended Year Program	\$ 2,259	\$ 3,411	\$ 3,331	\$ 390	\$ 3,721	91.7%	10.0%		
31-1225 Sped Educ State Programs	\$ 5,997	\$ 6,742	\$ 5,557	\$ 1,798	\$ 7,355	91.7%	10.0%		
31-1278 Sped Educ Stipends Extended Year	\$ 1,904	\$ 672	\$ 784	\$ (112)	\$ 672	100.0%	0.0%		
31-5201 Class Size Reduction K-8	\$ 351,803	\$ 342,822	\$ 345,922	\$ 28,099	\$ 374,021	91.7%	10.0%		
31-5344 Enhancement for At-Risk Student	\$ 64,658	\$ 84,274	\$ 63,577	\$ 28,358	\$ 91,935	91.7%	10.0%		
31-5901 Career and Tech Ed Dist. Add-On	\$ 5,668	\$ 5,580	\$ 5,897	\$ 190	\$ 6,087	91.7%	10.0%		
31-5903 CTE Comprehensive Counseling	\$ 20,000	\$ 18,333	\$ 19,666	\$ 334	\$ 20,000	91.7%	10.0%		
32-0500 Charter School Admin--Costs Base Funding	\$ 96,528	\$ 86,728	\$ 94,914	\$ (301)	\$ 94,613	91.7%	10.0%		
32-5619 Charter School Local Replacement	\$ 2,746,917	\$ 2,712,083	\$ 2,899,000	\$ 59,636	\$ 2,958,636	91.7%	10.0%		
32-5651 Educator Professional Time	\$ -	\$ 86,875	\$ -	\$ 86,875	\$ 86,875	100.0%	0.0%		
32-5653 Public Ed Capital & Technology	\$ -	\$ 128,603	\$ -	\$ 128,603	\$ 128,603	100.0%	0.0%		
33-5641 Early Intervention - OEK	\$ 152,652	\$ 137,500	\$ 152,652	\$ (2,652)	\$ 150,000	91.7%	10.0%		
33-5805 Early Literacy	\$ 51,450	\$ 29,411	\$ 50,590	\$ (18,680)	\$ 31,910	92.2%	9.3%		
34-5642 Elementary School Counselor Grant	\$ 50,000	\$ 50,000	\$ 50,000	\$ -	\$ 50,000	100.0%	0.0%		
34-5807 Teacher Salary Supplement Program	\$ -	\$ 3,570	\$ -	\$ 3,570	\$ 3,570	100.0%	0.0%		
34-5868 Teacher Supplies and Materials	\$ 7,415	\$ 7,372	\$ 7,415	\$ (43)	\$ 7,372	100.0%	0.0%		
34-5876 Educator Salary Adjustment	\$ 248,457	\$ 239,059	\$ 248,457	\$ 12,335	\$ 260,792	91.7%	10.0%		
34-5911 ELL Software	\$ 6,332	\$ 4,226	\$ -	\$ 4,226	\$ 4,226	100.0%	0.0%		
35-5420 School Land Trust Program	\$ 134,357	\$ 137,330	\$ 137,145	\$ 185	\$ 137,330	100.0%	0.0%		
35-5655 Digital Teaching & Learning	\$ 62,886	\$ -	\$ 58,919	\$ 1,917	\$ 60,836	0.0%	0.0%		
35-5666 Professional Learning Grant	\$ -	\$ 8,280	\$ -	\$ 9,033	\$ 9,033	91.7%	10.0%		
35-5678 TSSA	\$ 165,244	\$ 182,218	\$ 163,633	\$ 42,027	\$ 205,660	88.6%	9.4%		
35-5679 School Based Mental Health Grant	\$ 54,851	\$ 55,474	\$ 54,851	\$ 623	\$ 55,474	100.0%	0.0%		
35-5810 Library Books & Elective Resources	\$ 1,067	\$ 978	\$ 1,049	\$ 18	\$ 1,067	91.7%	10.0%		
Library ARPA Physical Collection Grant	\$ 2,000	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
Children & Teen Enhancement Grant	\$ 3,000	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
38-5654 Period Products in Schools	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
38-5673 Substance Prevention	\$ 2,333	\$ 4,000	\$ 2,294	\$ 1,706	\$ 4,000	100.0%	0.0%		
38-5674 Elementary Suicide Prevention	\$ 1,000	\$ 1,000	\$ 1,000	\$ -	\$ 1,000	100.0%	0.0%		
38-5697 LETRS Professional Development Grant	\$ -	\$ 48,637	\$ -	\$ 48,637	\$ 48,637	100.0%	0.0%		
38-8070 School Lunch (Liquor Tax)	\$ 121,242	\$ 78,522	\$ 70,000	\$ 30,000	\$ 100,000	78.5%	13.6%		
19-5601 Beverly Taylor Sorenson Grant	\$ 26,541	\$ 26,231	\$ 27,611	\$ -	\$ 27,611	95.0%	10.0%		
<b>Total 3000:</b>	<b>\$ 8,296,299</b>	<b>\$ 8,313,727</b>	<b>\$ 8,618,679</b>	<b>\$ 479,922</b>	<b>\$ 9,098,601</b>	<b>91.4%</b>	<b>10.1%</b>		
4000 Revenue From Federal Sources									
42-7210 ESSER CARES	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
42-7215 ESSER II CARES	\$ 45,009	\$ 22,140	\$ 29,231	\$ -	\$ 29,231	75.7%	0.0%		
42-7220 GEERS	\$ 22,714	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
42-7225 ESSER III ARP	\$ 448,374	\$ 33,005	\$ 54,000	\$ -	\$ 54,000	61.1%	0.0%		
45-7280 Corona Relief Grant	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
45-7522 IDEA Pre-School	\$ 2,588	\$ -	\$ 2,588	\$ (260)	\$ 2,328	0.0%	0.0%		
45-7524 IDEA Flow-Through	\$ 141,461	\$ -	\$ 141,461	\$ (2,087)	\$ 139,374	0.0%	0.0%		
45-8075 National School Lunch Program	\$ 46,614	\$ 84,058	\$ 40,000	\$ 49,000	\$ 89,000	94.4%	13.4%		
45-8075 Free & Reduced Reimbursement	\$ 545,496	\$ 99,229	\$ 115,000	\$ -	\$ 115,000	86.3%	13.7%		
45-8075 School Breakfast Program	\$ 57,387	\$ 30,481	\$ 35,000	\$ -	\$ 35,000	87.1%	13.9%		
45-8081 Emergency Operating Funds	\$ 536	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
47-7290 CARES UEN WiFi	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
48-7801 Federal Title I A	\$ 93,232	\$ 10,000	\$ 32,784	\$ 8,269	\$ 41,053	24.4%	0.0%		
48-7860 Federal NCLB Title II A	\$ 14,409	\$ -	\$ 13,603	\$ (13,603)	\$ -	0.0%	0.0%		
<b>Total 4000:</b>	<b>\$ 1,417,820</b>	<b>\$ 278,913</b>	<b>\$ 463,667</b>	<b>\$ 41,319</b>	<b>\$ 504,986</b>	<b>55.2%</b>	<b>14.7%</b>		
<b>Total Revenue:</b>	<b>\$ 9,825,234</b>	<b>\$ 9,084,303</b>	<b>\$ 9,308,395</b>	<b>\$ 815,283</b>	<b>\$ 10,123,678</b>	<b>0.0%</b>	<b>10.8%</b>		



Expenses	(1013 Students)	Current Yr	(1010 Students)	1005		% Change From Prior Mth	
	FY22 Actuals	Actuals	Approved Budget	Changes	Forecast		% of Forecast
<b>100 Salaries</b>							
121 Administration	\$ 348,257	\$ 356,367	\$ 390,906	\$ 8,000	\$398,906	89.3%	10.4%
131 Teachers	\$ 2,464,001	\$ 2,498,655	\$ 2,653,940	\$ 97,715	\$2,751,656	90.8%	10.4%
131 Special Education Salaries	\$ 209,402	\$ 205,576	\$ 223,304	\$ 91,159	\$314,463	65.4%	10.5%
132 Substitute Teachers (PTO Stipend)	\$ 8,326	\$ -	\$ 30,000	\$ -	\$ 30,000	0.0%	0.0%
132 SpEd Substitutes	\$ -	\$ -	\$ 5,000	\$ -	\$ 5,000	0.0%	0.0%
131 Stipends / Merit Pay	\$ 80,397	\$ 53,715	\$ 52,020	\$ 6,980	\$ 59,000	91.0%	36.0%
Summer Professional Development		\$ 12,000	\$ -	\$ 60,000	\$ 60,000	20.0%	0.0%
LETRS Training Stipend		\$ 72,500	\$ 65,000	\$ 7,500	\$ 72,500	100.0%	38.1%
LAND TRUST - Stipends	\$ 1,125	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
Special Education Stipends (After School)	\$ 43,904	\$ 2,500	\$ -	\$ -	\$ -	0.0%	0.0%
ESSER II - Stipends	\$ 3,000	\$ 11,125	\$ 12,000	\$ -	\$ 12,000	92.7%	140.5%
ESSER III - After School Stipends	\$ 58,250	\$ 58,500	\$ 54,000	\$ -	\$ 54,000	108.3%	100.0%
142 Counselor	\$ 151,048	\$ 159,809	\$ 171,182	\$ 6,000	\$177,182	90.2%	10.2%
143 School Nurse	\$ 2,717	\$ 3,927	\$ 9,075	\$ (4,075)	\$5,000	78.5%	12.9%
145 Librarian / Literacy Aide	\$ 12,483	\$ 15,068	\$ 23,835	\$ (8,335)	\$15,500	97.2%	12.7%
152 Secretaries	\$ 110,496	\$ 115,362	\$ 121,982	\$ -	\$121,982	94.6%	11.5%
161 Teacher Aides, Reading Specialists & Subs	\$ 287,163	\$ 386,344	\$ 419,165	\$ -	\$419,165	92.2%	14.8%
161 LAND TRUST - K Aide/Student Support Para	\$ 30,935	\$ 34,000	\$ 34,000	\$ -	\$ 34,000	100.0%	9.8%
161 SpEd Aides & Speech Therapist	\$ 127,717	\$ 136,091	\$ 159,398	\$ -	\$159,398	85.4%	12.1%
162 Computer Aides	\$ 36,595	\$ 19,526	\$ 21,005	\$ -	\$21,005	93.0%	14.5%
182 Custodial & Maintenance	\$ 110,269	\$ 80,476	\$ 107,917	\$ -	\$107,917	74.6%	12.2%
191 Lunch Room Aide	\$ 231,425	\$ 226,047	\$ 299,916	\$ (49,916)	\$250,000	90.4%	12.2%
<b>Total 100:</b>	<b>\$ 4,317,510</b>	<b>\$ 4,447,588</b>	<b>\$ 4,853,645</b>	<b>\$ 215,029</b>	<b>\$ 5,068,674</b>	<b>87.7%</b>	<b>12.8%</b>
<b>200 Employee Benefits</b>							
220 Social Security	\$ 281,966	\$ 299,534	\$ 339,044	\$ 38,550	\$ 377,594	79.3%	13.0%
LAND TRUST - BENEFITS	\$ 4,574	\$ 2,601	\$ 2,601	\$ -	\$ 2,601	100.0%	9.8%
SpEd Social Security	\$ 23,687	\$ 20,869	\$ 29,659	\$ -	\$ 29,659	70.4%	12.2%
230 Retirement	\$ 203,879	\$ 193,174	\$ 214,523	\$ -	\$ 214,523	90.0%	10.4%
240 Group Insurance	\$ 668,982	\$ 591,967	\$ 656,000	\$ 15,000	\$ 671,000	88.2%	9.1%
240 Deductible Stipend	\$ 15,868	\$ 26,368	\$ 15,000	\$ 13,000	\$ 28,000	94.2%	12.8%
270 Worker's Compensation Fund	\$ 15,225	\$ 18,867	\$ 16,425	\$ 2,442	\$ 18,867	100.0%	0.0%
280 Unemployment Insurance	\$ 8,483	\$ 7,633	\$ 13,238	\$ (2,238)	\$ 11,000	69.4%	0.0%
<b>Total 200:</b>	<b>\$ 1,222,664</b>	<b>\$ 1,161,013</b>	<b>\$ 1,286,490</b>	<b>\$ 66,754</b>	<b>\$ 1,353,244</b>	<b>85.8%</b>	<b>10.2%</b>
<b>300 Purchased Professional &amp; Technical</b>							
320 Special Education Contractors	\$ 100,505	\$ 114,204	\$ 120,610	\$ -	\$ 120,610	94.7%	13.5%
320 Counseling Services - (FY20 LCSW-Mental Health)	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
330 Employee Training & Development	\$ 32,005	\$ -	\$ 30,000	\$ (25,000)	\$ 5,000	0.0%	0.0%
TSSA - Training & Development	\$ -	\$ 30,000	\$ -	\$ 30,000	\$ 30,000	100.0%	3.5%
LAND TRUST - Training & Development	\$ 9,134	\$ 1,232	\$ 24,000	\$ -	\$ 24,000	5.1%	0.0%
SpEd Training & Development	\$ 1,800	\$ 6,000	\$ -	\$ 6,000	\$ 6,000	100.0%	0.0%
LETRS Professional Learning Grant PD		\$ 48,637	\$ -		\$ 48,637	100.0%	0.0%
330 SEDC Services	\$ -	\$ 2,583	\$ 3,891	\$ -	\$ 3,891	66.4%	0.0%
340 Audit	\$ 22,070	\$ 22,134	\$ 22,070	\$ 64	\$ 22,134	100.0%	0.0%
345 Business Manager Services	\$ 76,800	\$ 71,808	\$ 78,336	\$ -	\$ 78,336	91.7%	10.0%
349 Legal Services	\$ 1,638	\$ 4,113	\$ 15,000	\$ -	\$ 15,000	27.4%	0.0%
350 Technical Services (IT)	\$ 98,144	\$ 88,356	\$ 101,760	\$ -	\$ 101,760	86.8%	10.0%
580 Admin & Teacher Travel (Meals)	\$ 29,004	\$ 11,358	\$ 20,280	\$ (6,280)	\$ 14,000	81.1%	35.3%
TSSA - Travel	\$ -	\$ 20,280	\$ -	\$ 20,280	\$ 20,280	100.0%	0.0%
LAND TRUST - Travel	\$ 6,538	\$ 6,000	\$ 6,000	\$ -	\$ 6,000	100.0%	0.0%
SpEd - Travel	\$ 2,621	\$ 5,075	\$ 2,220	\$ 2,855	\$ 5,075	100.0%	0.0%
<b>Total 300:</b>	<b>\$ 380,259</b>	<b>\$ 431,780</b>	<b>\$ 424,167</b>	<b>\$ 27,919</b>	<b>\$ 500,723</b>	<b>86.2%</b>	<b>9.1%</b>
<b>400 Purchased Property Services</b>							
411 Water/Sewage	\$ 10,597	\$ 8,867	\$ 12,000	\$ -	\$ 12,000	73.9%	8.2%
412 Disposal Services	\$ 11,222	\$ 14,246	\$ 13,000	\$ 2,480	\$ 15,480	92.0%	13.1%
420 Cleaning Services	\$ 2,684	\$ 5,313	\$ 4,000	\$ 1,800	\$ 5,800	91.6%	0.0%
431 Lawn Care Services	\$ 10,700	\$ 10,950	\$ 12,000	\$ -	\$ 12,000	91.3%	8.4%
431 Non-Technology Repairs & Maintenance	\$ 31,073	\$ 29,104	\$ 30,000	\$ 3,000	\$ 33,000	88.2%	3.6%
432 Copy Machine Servicing	\$ 9,145	\$ 5,629	\$ 13,000	\$ (5,000)	\$ 8,000	70.4%	0.0%
<b>Total 400:</b>	<b>\$ 75,421</b>	<b>\$ 74,109</b>	<b>\$ 84,000</b>	<b>\$ 33,054</b>	<b>\$ 86,280</b>	<b>85.9%</b>	<b>6.0%</b>
<b>500 Other Purchased Services</b>							
522 Property & Liability Insurance	\$ 42,668	\$ 40,388	\$ 45,300	\$ -	\$ 45,300	89.2%	11.0%
530 Telephone	\$ 10,127	\$ 1,081	\$ 11,000	\$ -	\$ 11,000	9.8%	9.1%
540 Marketing	\$ 9,042	\$ 7,923	\$ 9,000	\$ -	\$ 9,000	88.0%	0.0%
590 Field Trips / Bus Rental	\$ 100	\$ 170	\$ 3,000	\$ -	\$ 3,000	5.7%	0.0%
<b>Total 500:</b>	<b>\$ 61,937</b>	<b>\$ 49,562</b>	<b>\$ 68,300</b>	<b>\$ -</b>	<b>\$ 68,300</b>	<b>72.6%</b>	<b>9.0%</b>



	(1013 Students) FY22 Actuals	Current Yr Actuals	(1010 Students) Approved Budget	1005 Changes	Forecast	% of Forecast	% Change From Prior Mth
<b>600 Supplies and Materials</b>							
610a Classroom Supplies	\$ 50,898	\$ 16,248	\$ 63,000	\$ (43,000)	\$ 20,000	81.2%	42.3%
TSSA - Supplies	\$ -	\$ 3,167	\$ -	\$ 18,320	\$ 18,320	17.3%	0.0%
LAND TRUST	\$ 3,227	\$ 11,967	\$ 12,000	\$ -	\$ 12,000	99.7%	0.0%
ESSER II - Supplies	\$ -	\$ 17,171	\$ 17,000	\$ -	\$ 17,000	101.0%	1.4%
610b Special Ed Supplies	\$ 7,321	\$ 5,203	\$ 10,000	\$ -	\$ 10,000	52.0%	14.8%
610c Theatre Supplies	\$ 3,334	\$ 6,886	\$ 4,000	\$ 3,000	\$ 7,000	98.4%	0.4%
610d CCA Expenses	\$ 7,159	\$ 4,843	\$ 5,179	\$ -	\$ 5,179	93.5%	186.9%
610e Student Activity Supplies / Incentives	\$ 9,655	\$ 13,613	\$ 18,000	\$ (2,000)	\$ 16,000	85.1%	13.9%
610f Board Expenses/meals	\$ 3,393	\$ 3,616	\$ 7,000	\$ -	\$ 7,000	51.7%	13.7%
610g Office Supplies/General	\$ 24,713	\$ 27,127	\$ 28,000	\$ -	\$ 28,000	96.9%	-0.6%
610h Safety Supplies	\$ 2,322	\$ 3,620	\$ 3,000	\$ 1,000	\$ 4,000	90.5%	1.3%
610i GWA Gives Back	\$ 5,096	\$ 1,295	\$ -	\$ 1,295	\$ 1,295	100.0%	31.3%
610j First Aid Supplies	\$ 398	\$ 862	\$ 1,000	\$ -	\$ 1,000	86.2%	0.0%
610k Director Discretionary Fund	\$ 9,693	\$ 9,781	\$ 10,000	\$ -	\$ 10,000	97.8%	5.3%
610m Staff Lounge	\$ 5,570	\$ 5,772	\$ 5,500	\$ 272	\$ 5,772	100.0%	0.0%
610n Swag Store	\$ 4,821	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
610o Christmas Party	\$ 4,018	\$ 3,780	\$ 4,018	\$ -	\$ 4,018	94.1%	0.0%
610p Health and Wellness Incentives	\$ 1,793	\$ 2,196	\$ 4,000	\$ -	\$ 4,000	54.9%	18.6%
621 Natural Gas	\$ 10,144	\$ 13,652	\$ 12,500	\$ 1,500	\$ 14,000	97.5%	14.6%
622 Electricity	\$ 40,467	\$ 38,935	\$ 40,000	\$ 3,000	\$ 43,000	90.5%	10.2%
630 School Lunch Prgm	\$ 208,598	\$ 218,576	\$ 200,000	\$ 30,000	\$ 230,000	95.0%	10.4%
641 Textbooks/Curriculum	\$ 26,138	\$ 36,474	\$ 76,081	\$ (20,200)	\$ 55,881	65.3%	49.1%
TSSA - Curriculum	\$ -	\$ 39,200	\$ -	\$ 39,200	\$ 39,200	100.0%	0.0%
UCCRSC	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
Digital Teaching & Learning Curriculum	\$ 51,395	\$ 45,836	\$ 43,919	\$ 1,917	\$ 45,836	100.0%	0.0%
SpEd - Textbooks/Curriculum	\$ -	\$ 29,855	\$ -	\$ 29,855	\$ 29,855	100.0%	0.0%
644 Library Books	\$ 9,654	\$ 5,318	\$ 7,000	\$ -	\$ 7,000	76.0%	0.0%
670 Educational Software	\$ 21,357	\$ 6,236	\$ 26,500	\$ (10,800)	\$ 15,700	39.7%	0.0%
TSSA - Educational Software	\$ -	\$ 10,800	\$ -	\$ 10,800	\$ 10,800	100.0%	0.0%
LAND TRUST - Educational Software	\$ 14,501	\$ 14,700	\$ 14,700	\$ -	\$ 14,700	100.0%	0.0%
SpEd - Educational Software	\$ 1,343	\$ 690	\$ 3,400	\$ -	\$ 3,400	20.3%	0.0%
ESSER III - Educational Software	\$ 29,360	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
680 Maintenance Supplies & Material	\$ 29,619	\$ 37,260	\$ 40,000	\$ 2,244	\$ 42,244	88.2%	2.7%
ESSER III - Maintenance Supplies	\$ 5,123	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
<b>Total 600:</b>	<b>\$ 591,110</b>	<b>\$ 634,679</b>	<b>\$ 655,797</b>	<b>\$ 66,403</b>	<b>\$ 722,200</b>	<b>87.9%</b>	<b>8.7%</b>
<b>700 Property</b>							
710 Land and Site Improvements & Building	\$ 30,499	\$ 24,089	\$ 25,000	\$ 82,000	\$ 107,000	22.5%	0.0%
733 Furniture and Fixtures	\$ 15,649	\$ 19,702	\$ 20,000	\$ -	\$ 20,000	98.5%	24.6%
SpEd - Furniture and Fixtures	\$ -	\$ 1,296	\$ -	\$ 1,296	\$ 1,296	100.0%	0.0%
734 Technology Hardware	\$ 19,393	\$ 1,347	\$ 2,700	\$ 1	\$ 2,700	49.9%	0.1%
LAND TRUST - Hardware	\$ 50,403	\$ 49,510	\$ 55,000	\$ -	\$ 55,000	90.0%	23.6%
SpEd - Tech Hardware	\$ 4,485	\$ 345	\$ -	\$ 345	\$ 345	100.0%	0.0%
ESSER III - Tech Hardware	\$ 332,124	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
Digital Teaching & Learning Hardware	\$ -	\$ 15,000	\$ 15,000	\$ -	\$ 15,000	100.0%	0.0%
736 Technology Software	\$ 46,451	\$ 599	\$ 48,000	\$ (48,000)	\$ -	0.0%	0.0%
TSSA - Software	\$ -	\$ 48,000	\$ -	\$ 48,000	\$ 48,000	100.0%	0.0%
LAND TRUST - Software	\$ 7,712	\$ 5,500	\$ 5,500	\$ -	\$ 5,500	100.0%	0.0%
SpEd - Software	\$ 1,600	\$ 1,680	\$ 1,600	\$ 80	\$ 1,680	100.0%	0.0%
739 Kitchen Equipment	\$ 4,168	\$ 23,440	\$ 20,000	\$ 3,440	\$ 23,440	100.0%	0.0%
790 Cap Ex Fund	\$ 127,067	\$ 177,616	\$ 150,000	\$ 163,003	\$ 313,003	56.7%	10.6%
<b>Total 700:</b>	<b>\$ 639,551</b>	<b>\$ 368,124</b>	<b>\$ 342,800</b>	<b>\$ 250,164</b>	<b>\$ 592,964</b>	<b>62.1%</b>	<b>9.0%</b>
<b>800 Debt Service &amp; Miscellaneous</b>							
810 Dues and Fees	\$ 11,165	\$ 13,191	\$ 15,000	\$ -	\$ 15,000	87.9%	1.5%
830 Bond Restricted Assets (Interest)	\$ 530,913	\$ 410,909	\$ 500,913	\$ -	\$ 500,913	82.0%	10.5%
840 Bond Restricted Assets (Principal)	\$ 750,000	\$ 711,396	\$ 785,000	\$ -	\$ 785,000	90.6%	10.6%
833 Bond Fees	\$ 57,240	\$ 7,300	\$ 33,800	\$ -	\$ 33,800	21.6%	0.0%
890 Miscellaneous	\$ 3,486	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
<b>Total 800:</b>	<b>\$ 1,352,804</b>	<b>\$ 1,142,796</b>	<b>\$ 1,334,713</b>	<b>\$ -</b>	<b>\$ 1,334,713</b>	<b>85.6%</b>	<b>10.4%</b>
<b>Total Expenses:</b>	<b>\$ 8,641,256</b>	<b>\$ 8,309,651</b>	<b>\$ 9,049,911</b>	<b>\$ 659,323</b>	<b>\$ 9,727,097</b>	<b>85.4%</b>	<b>11.3%</b>
<b>Net Income:</b>	<b>\$ 1,183,978</b>	<b>\$ 774,652</b>	<b>\$ 258,484</b>	<b>\$ 155,960</b>	<b>\$ 396,581</b>	<b>195.3%</b>	
					<b>\$ 250,000</b>	<b>Restricted Forecasted Spend Down</b>	
					<b>\$ 361,805</b>	Food Service: \$ 34,776	
					<b>\$ 34,776</b>	SpEd: \$ (48,234)	
<b>Cap Ex Fund:</b>		<b>At year end: \$ 168,402</b>		<b>Use: \$177,616</b>	<b>At year end: \$ 303,789</b>		
<b>(Unrestricted over \$350,000) Special Project Fund:</b>		<b>Beg of Year \$ 97,843</b>			<b>At year end: \$ 109,648</b>		
<b>Fund Reserve:</b>	<b>\$ 5,841,739</b>		<b>\$ 6,100,223</b>		<b>\$ 6,203,544</b>		

**GEORGE WASHINGTON ACADEMY**

**Balance Sheet**

As of May 31, 2023

	<u>May 31, 23</u>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Checking/Savings</b>	
<b>8110 · Cash in Banks</b>	
<b>8111 · Cache Valley Bank Accounts</b>	
1 · Petty Cash	179.07
8111.1 · Cache Valley Bank (2050)	1,409,052.97
8111.2 · Cache Valley Bank Debit (0459)	5,589.11
<b>Total 8111 · Cache Valley Bank Accounts</b>	<u>1,414,821.15</u>
<b>8116 · PTIF</b>	6,607,671.18
<b>8120 · US Bank Accounts</b>	
8120.1C · Principal Fund 2015 (80001)	137,585.05
8120.2 · Interest Fund 2008 (9002)	0.02
8120.2B · Interest Fund 2011 (5001)	0.01
8120.2C · Interest Fund 2015 (80002)	84,827.27
8120.3C · Reserve Fund 2015 (80003)	1,285,912.50
8120.5C · Repair & Rplcmnt 2015 (80005)	150,000.00
8120.6C · Expense Fund 2015 (80006)	70,760.17
<b>Total 8120 · US Bank Accounts</b>	<u>1,729,085.02</u>
<b>Total 8110 · Cash in Banks</b>	<u>9,751,577.35</u>
<b>Total Checking/Savings</b>	9,751,577.35
<b>Other Current Assets</b>	
<b>8130 · Accounts Recievable</b>	
8133 · State	898.00
8135 · Utah State Sales Tax	4,239.13
<b>Total 8130 · Accounts Recievable</b>	<u>5,137.13</u>
<b>Total Other Current Assets</b>	<u>5,137.13</u>
<b>Total Current Assets</b>	<u>9,756,714.48</u>
<b>TOTAL ASSETS</b>	<u><u><b>9,756,714.48</b></u></u>
<b>LIABILITIES &amp; EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
9513 · Accounts Payable-bill.com	44,331.97
<b>Total Accounts Payable</b>	44,331.97
<b>Credit Cards</b>	
9531 · Visa Card	
9531a · VISA Card - Jessica's Card	-123.80
9531b · VISA Card - Blake's Card	45.20
9531d · VISA Card - Shannon's Card	-1,000.00
9531e · VISA Card - Chance's Card	-249.00
<b>Total 9531 · Visa Card</b>	<u>-1,327.60</u>
9532 · Lowe's	27.32
<b>Total Credit Cards</b>	<u>-1,300.28</u>
<b>Other Current Liabilities</b>	
9510 · Accounts Payable	479.66
9530 · Accrued Liabilities	
9535 · Accrued Bond Liability	-163,607.68
<b>Total 9530 · Accrued Liabilities</b>	<u>-163,607.68</u>
9540 · Accrued Salaries & Withholdings	
9544 · Utah State Withholding	19,475.00

GEORGE WASHINGTON ACADEMY

Balance Sheet

As of May 31, 2023

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	<u>May 31, 23</u>
Total 9540 · Accrued Salaries & Withholdings	19,475.00
9540a · Payroll & Benefit YE Accrual	262,057.32
9560 · Deferred Revenue	
9561 · Local	9,139.81
9563 · State	400,000.00
Total 9560 · Deferred Revenue	409,139.81
Total Other Current Liabilities	527,544.11
Total Current Liabilities	570,575.80
Total Liabilities	570,575.80
Equity	
30000 · Opening Balance Equity	193.93
9820 · Net Assets - Restricted	274,127.03
9830 · Retained Earnings	7,707,643.67
9850 · Unreserved Fund Balances	7,398.97
9859 · Undesignated Fund Balance	422,122.16
Net Income	774,652.92
Total Equity	9,186,138.68
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>9,756,714.48</b>



# George Washington Academy

PTO End of Year Report/Audit  
For the 2022-2023 school year  
July 1, 2022-June 30, 2023

## School Profile

Address: 2277 S 3000 E, St. George, UT 84790

Principal: Blake Clark

### PTO Members:

Acting President: Ayelen Butler

Treasurer: Karina Johnson

Board Member Rep: Amanda Mortenson

Secretary: Amber Corkin

Treasurer: Sharon Moss

Social Media Secretary: Trisha Nepomuceno

## Financial Summary

Funds in account: 7/2022	\$85,509.63 (Checkings)	6/2023	\$104,472.68 (Checkings)
	\$4,371.20 (Savings)		\$4,367.62 (Savings)

TOTAL: \$108,840.30

Proposed budget: \$47,913

Actual budget: \$79,846.66

Funds Raised: \$66,210.99

Scholastics: \$8,215.76

Must Spend \$1,133.98 by September

\*Funds still need to be paid to Snow Electric and Tiffany Dewitt for Playground Stencils

## Funds Allocated

### Activities Funds were Contributed to:

- Back to School Night/Meet Teacher
- Leader in Me Incentives: Gift cards
- Kindergarten Graduation
- 7th Grade Graduation
- GWA Gives Back
- 5th Grade "Give Me Liberty"
- Middle School
  - 6th Grade experience
  - 7th Grade experience

### Teacher Appreciation

- 4 SEP Dinners
- 6 lunches

### Activities Organized:

- Art Fair/Competition
- Field Day
- Fall Fundraiser
- Family Appreciation Night
- Money Drive
- Pastries with Parents

### Items for School:

- Water Fountain
- Outdoor equipment—36 soccer balls, 24 playground balls, 24 basketball, 30 jump ropes
- Cart
- Volleyball Poles
- 5 Gift Cards for Counseling Center
- Student Shirts—1,228

In accordance with the State Board of Education Rule we have audited the financial statements of the PTO at George Washington Academy for the 2022-23 school year. We conducted our audit in accordance with information given to us by the School Board President.

The financial statements of the PTO are in order and all supporting documentation was provided. All bank recorders corresponded with PTO tracking and all payments and reimbursements were approved for events to support and enhance the experience of George Washington Academy students, families, and staff.

The PTO focused the last part of the year on strengthening the connection between the PTO and GWA faculty. PTO received feedback from the GWA administration that this was accomplished. The PTO also focused on creating meaningful events for students and their families by creating a culture where all families feel welcomed.

### Other Comments

- Check book was lost in January and found 3 days later. To take precautions we closed the account and a new account was opened to avoid any loss of funds.
- Funds were approved during the PTO meeting in March to transfer \$1500 from Teacher Appreciation to SEP Dinners for teachers.
- The PTO President, Alisha Madsen resigned mid year and Ayelen Butler became Acting President.

### Recommendation

- School Board Members to provide formal training and continue interaction.
- Update Bylaws
- Educate GWA staff of the PTO resources and how they can be utilized
- Create a pathway to request the PTO funds

Audit was completed on June 7, 2023 by:



Sharon Moss  
Treasurer



Ayelen Butler  
Acting President

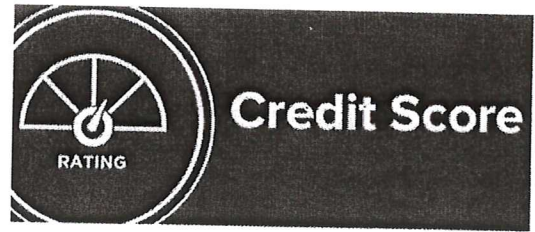
	2022/23 Budget	Actual Amount Spent	Deposits if applicable	Amount Left
<b>Operating Expenses</b>				
PTO Marketing Costs	\$2,000	-\$342		\$1,658
Misc Fees	\$0.00			
Returned Checks	\$0.00			
<b>Program Expenses</b>				
5th Grade "Give Me Liberty"	\$500.00	-\$407.31	0	\$92.69
Middle School	\$1,450.00	-\$1,257.79	0	\$192.21
Art Fair/Competition	\$250.00	-\$193	0	\$57.00
Back to School Night/Meet Teacher	\$500.00	-\$162.77	0	\$337.23
Leader in Me Incentives	\$3,500	-\$1,000	0	\$2,500
Field Day	\$1,500.00	-\$1,507.69	0	-\$7.69
Middle School Dance	\$300.00	0	0	300
GWA Faculty Requests	\$5,000	-\$2,319.77	0	\$2,680
Main Fundraisers	\$9,000.00	-\$7,174.31	\$6,345.32	\$8,171.01
Teacher Appreciation	\$5,200.00	-\$2,101.13	0	\$3,098.87
Parent Appreciation Events	\$1,200.00	-\$525.58	0	\$674.42
SEP Dinners	\$4,000.00 [1]	-\$2,851.76	0	\$1,148.24
GWA Gives Back	\$500.00	-\$400	0	\$100.00
Kindergarten Graduation	\$250.00	-\$209.26	0	\$40.74
7th Grade Graduation	\$250.00	-\$188.79	0	\$61.21
Family Appreciation Night	\$3,500.00	-\$3,288.51	0	\$211.49
Red Ribbon Week	\$300.00	0	0	300
Hope Kindness and Career Week	\$200.00	0	0	200
Reading Incentives	\$200.00	0	0	200
Money Drive	\$2,000.00	-\$6,099.34	14,653.65	\$10,554.31 [2]
Logo Shirts	\$6,313	-\$6,587.50	\$0	-\$275
Yearbooks	\$0		619.81	
Sponsorships	\$0	-\$2,031	\$39,395	
Money Drive	\$0	-\$7,693.44	\$14,653.65	
Book Fair Fall [3]	\$0	-\$5,386.00	\$4,240.33	
Book Fair Spring	\$0	-\$2,652.21	\$2,881.75	
Dixie Direct	\$0	-\$25,467.50	\$34,275	
Denim Days	\$0	0	\$815.83	
Restaurant Nights	\$0	0	\$808.00	
Uniform Sale	\$0	0	\$936.54	
Candy Drive	\$0	0	\$1,393.16	

Totals		\$47,913	-79846.66	121018.04	32294.96
<b>Total Budget</b>		<b>\$47,913</b>		<b>Total Deposits</b>	<b>\$121,018.04</b>
<b>Leftover Budget</b>		<b>\$15,617.54</b>		<b>Total Expenses</b>	<b>-\$79,846.66</b>
<b>Total Budget Used</b>		<b>\$32,295.46</b>		<b>Net Funds Rais</b>	<b>41,171.38</b>
Total Fundraised before expenses		\$66,210.99			
<u>(includes Dixie Direct, Money Drive, Carnival, Sponsorships, Denim Days, Uniform Sales, Yearbooks, Logo</u>					



081286

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### Summary of Accounts

Member Number: 0001132102

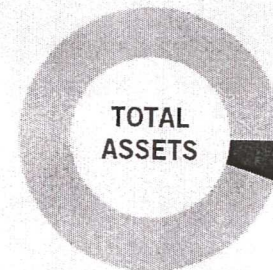
Statement Period: 07/01/22 to 07/31/22

#### SHARE

	BALANCE
PRIME SHARE	\$4,371.20
CUSTOM SHARE	\$0.00
BUSINESS CUSTOM SHARE	\$0.00

#### CHECKING

	BALANCE
LIFEPLUS CHECKING	\$85,509.63



■ SHARE  
 ■ CHECKING

#### PRIME SHARE / 0000

DATE	DESCRIPTION	WITHDRAWAL	DEPOSIT	BALANCE
07/01	Balance Forward			\$4,371.20
	Ending Balance			\$4,371.20
	Dividends Paid Year to Date		\$0.80	

#### CUSTOM SHARE / 0001

DATE	DESCRIPTION	WITHDRAWAL	DEPOSIT	BALANCE
07/01	Balance Forward			\$0.00
	Ending Balance			\$0.00
	Dividends Paid Year to Date		\$0.00	



# LIFE.

MADE AFFORDABLE.



## BUSINESS CUSTOM SHARE / 0002

DATE	DESCRIPTION	WITHDRAWAL	DEPOSIT	BALANCE
07/07	Balance Forward			\$0.00
	Ending Balance			\$0.00
	Dividends Paid Year to Date		\$0.00	

## LIFEPLUS CHECKING / 0009

DATE	DESCRIPTION	WITHDRAWAL	DEPOSIT	BALANCE
07/01	Balance Forward			\$99,542.41
07/06	Withdrawal <i>petty cash</i>	-\$200.00		\$99,342.41
07/14	Draft 3388 <i>Lucky Dog Recreation</i>	-\$12,045.00		\$87,297.41
07/14	Deposit <i>uniform sale + petty cash</i>		\$715.00	\$88,012.41
07/14	Withdrawal Debit Card DEBIT CARD TRANS 07/13 0 2194183842 4 VENMO 408-967-1000 CA <i>venmo OR kit</i>	-\$16.00		\$87,996.41
07/18	Deposit ACH VENMO TYPE: CASHOUT ID: 5264681992 CO: VENMO <i>uniform sale (venmo)</i>		\$410.84	\$88,407.25
07/18	Deposit ACH VENMO TYPE: CASHOUT ID: 5264681992 CO: VENMO <i>uniform sale</i>		\$10.70	\$88,417.95
07/21	Deposit by Check <i>Sponsor ships</i>		\$1,500.00	\$89,917.95
07/22	Withdrawal Debit Card DEBIT CARD TRANS 07/21 0 2202254096 3 Scholastic, Inc. 800-724-6527 NY <i>Scholastic</i>	-\$4,412.23		\$85,505.72
07/31	Deposit Dividend 0.050% Annual Percentage Yield Earned 0.050% From 07/01/22 Through 07/31/22		\$3.91	\$85,509.63
	Ending Balance			\$85,509.63
	Dividends Paid Year to Date		\$32.33	

DATE	CHECK #	AMOUNT
07/14	3388	\$12045.00

\* Asterisk next to number indicates skip in number sequence

## Profit & Reward Balance

### GEORGE WASHINGTON ACADEMY

Account # 1008918

Your school can earn Scholastic Dollars™ as profit from your Fair's sales or as rewards. Your school's account balance combines both of these amounts. Profit from your Fair earned as Scholastic Dollars does not expire, but rewards expire six months after your Fair's start date unless you hold another Fair within seven months, which extends your rewards until seven days after the Fair end date. Be sure to report any purchases with redeemed rewards within those seven days. We can't reissue expired rewards, but when you redeem Scholastic Dollars, amounts with an expiration date are automatically redeemed first.

Profit Balance

**\$7081.78**

Reward Balance

**\$1133.98**

### How to Redeem

There are several ways to redeem your Scholastic Dollars balance:

Take product from a future Scholastic Book Fair.

Shop the Scholastic Dollars Catalog online.

Call 800-799-7323 to place a Catalog order.

### EXPIRATION SCHEDULE

Redeem your bonuses and rewards before they expire. Upon redemption the balance will automatically be deducted in the order of expiration.

Date Issued	Source	Expiration Date	Balance
05/11/2023	Multiple Fairs Reward	09/29/2023	\$1133.98

### Transaction Details

Date	Description	Transaction	Balance
06/01/2022	Opening Balance		\$1,887.77
06/01/2022	Scholastic Dollars Catalog Refund	+\$49.48	\$1,937.25
06/03/2022	Sales Adj: Scholastic Dollars Catalog Ord	-\$911.03	\$1,026.22
06/16/2022	Scholastic Dollars Profit	+\$167.68	\$1,193.90
07/22/2022	Multiple Fairs Reward	+\$1,243.70	\$2,437.60
07/22/2022	Scholastic Dollars Profit	+\$6,218.51	\$8,656.11
07/22/2022	Books Taken at Fair Adj	-\$953.56	\$7,702.55
10/05/2022	Sales Adj: Scholastic Dollars Catalog Ord	-\$3,632.66	\$4,069.89
10/06/2022	Scholastic Dollars Catalog Refund	+\$25.49	\$4,095.38
10/21/2022	Sales Adj: Scholastic Dollars Catalog Ord	-\$1,660.90	\$2,434.48
10/21/2022	Scholastic Dollars Profit	+\$7,147.50	\$9,581.98
10/27/2022	Sales Adj: Scholastic Dollars Catalog Ord	-\$2,407.62	\$7,174.36
10/28/2022	Scholastic Dollars Catalog Refund	+\$109.96	\$7,284.32
11/10/2022	Sales Adj: Scholastic Dollars Catalog Ord	-\$1,479.86	\$5,804.46
01/05/2023	Sales Adj: Scholastic Dollars Catalog	-\$473.88	\$5,330.58

Date	Description	Transaction	Balance
	Ord		
02/24/2023	Sales Adj: Scholastic Dollars Catalog Ord	-\$1,388.76	\$3,941.82
03/13/2023	Sales Adj: Scholastic Dollars Catalog Ord	-\$1,975.14	\$1,966.68
04/13/2023	Sales Adj: Scholastic Dollars Catalog Ord	-\$222.10	\$1,744.58
05/11/2023	Multiple Fairs Reward	+\$1,133.98	\$2,878.56
05/11/2023	Scholastic Dollars Profit	+\$5,669.94	\$8,548.50
05/11/2023	Books Taken at Fair Adj	-\$332.74	\$8,215.76



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## Summary of Accounts

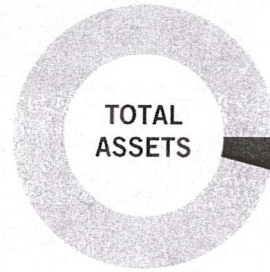
Member Number: 0001296310  
 Statement Period: 05/01/23 to 05/31/23

### SHARE

	BALANCE
BUSINESS SHARE	\$4,372.62

### CHECKING

	BALANCE
BUSINESS CHECKING	\$104,764.53



■ SHARE  
 ■ CHECKING

### BUSINESS SHARE / 0000

DATE	DESCRIPTION	WITHDRAWAL	DEPOSIT	BALANCE
05/01	Balance Forward			\$4,372.62
	Ending Balance			\$4,372.62
	Dividends Paid Year to Date		\$0.32	

### BUSINESS CHECKING / 0080

DATE	DESCRIPTION	WITHDRAWAL	DEPOSIT	BALANCE
05/01	Balance Forward			\$119,221.12
04/30	Withdrawal Debit Card DEBIT CARD TRANS 04/28 1 3118392704 4 Fiiz Drinks St. George St George UT	-\$200.00		\$119,021.12
04/30	Withdrawal Debit Card DEBIT CARD TRANS 04/28 1 3118392799 4 Quench it Soda St Geor St. George UT	-\$200.00		\$118,821.12
05/01	Withdrawal Debit Card DEBIT CARD TRANS 04/30 0 3120044351 7 AMZN Mktp US*HM9630XLO Amzn.com/bill WA	-\$17.07		\$118,804.05
05/02	Draft 108	-\$4,786.00		\$114,018.05



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**BUSINESS CHECKING / 0080**

DATE	DESCRIPTION	WITHDRAWAL	DEPOSIT	BALANCE
05/02	Draft 111	-\$350.00		\$113,668.05
05/03	Draft 1002	-\$289.31		\$113,378.74
05/03	Withdrawal Debit Card DEBIT CARD TRANS 05/02 0 3122479132 1 USPS PO 4985000769 SAINT GEORGE UT	-\$13.86		\$113,364.88
05/03	Withdrawal Debit Card DEBIT CARD TRANS 05/02 0 3122395669 1 WM SUPERCENTER #1439 WASHINGTON UT	-\$31.69		\$113,333.19
05/03	Withdrawal Debit Card DEBIT CARD TRANS 05/02 0 3122835243 1 DOLLAR TREE ST. GEORGE UT	-\$21.35		\$113,311.84
05/03	Withdrawal POS #000000479046 AMAZON.COM*T00S41U83 SEATTLE WA	-\$24.26		\$113,287.58
05/05	Withdrawal Debit Card DEBIT CARD TRANS 05/04 0 3124241880 7 AMZN Mktp US*665WE2XJ3 Amzn.com/bill WA	-\$30.92		\$113,256.66
05/07	Withdrawal Debit Card DEBIT CARD TRANS 05/05 1 3125644911 1 AMZN Mktp US*CT1YY8B73 Amzn.com/bill WA	-\$8.53		\$113,248.13
05/09	Draft 1001	-\$2,175.00		\$111,073.13
05/09	Draft 1004	-\$75.00		\$110,998.13
05/09	Withdrawal Debit Card DEBIT CARD TRANS 05/08 0 3128009574 0 STEAMROLLER COPIES RIV ST GEORGE UT	-\$15.00		\$110,983.13
05/10	Withdrawal Debit Card DEBIT CARD TRANS 05/09 0 3129602766 3 AMZN Mktp US*487216Y63 Amzn.com/bill WA	-\$21.06		\$110,962.07
05/11	Withdrawal POS #000034193048 Wal-Mart Super Center 3220 WAL-SAMS ST GEORGE UT	-\$21.63		\$110,940.44
05/11	Draft 110	-\$2,652.26		\$108,288.18
05/11	Draft 1005	-\$100.00		\$108,188.18
05/11	Withdrawal Debit Card DEBIT CARD TRANS 05/10 0 3130135217 4 AMZN Mktp US*UV2A91Y83 Amzn.com/bill WA	-\$21.06		\$108,167.12
05/11	Withdrawal Debit Card DEBIT CARD TRANS 05/10 0 3130487726 3 AMZN Mktp US*656VA4SY3 Amzn.com/bill WA	-\$21.06		\$108,146.06
05/11	Withdrawal Debit Card DEBIT CARD TRANS 05/10 0 3130137342 4 AMZN Mktp US*HJ7OS0VY3 Amzn.com/bill WA	-\$21.06		\$108,125.00
05/11	Withdrawal Debit Card DEBIT CARD TRANS 05/10 0 3130485591 3 AMZN Mktp US*Y057D5OL3 Amzn.com/bill WA	-\$21.06		\$108,103.94
05/11	Withdrawal Debit Card DEBIT CARD TRANS 05/11 0 3131106561 2 MEGAPLEX FULFILLMENT C 801-304-4577 UT	-\$1,014.00		\$107,089.94
05/11	Withdrawal Debit Card DEBIT CARD TRANS 05/10 0 3130424664 0 FIESTA FUN CENTER ST GEORGE UT	-\$377.97		\$106,711.97
05/15	Draft 112	-\$15.05		\$106,696.92
05/16	Draft 1003	-\$75.00		\$106,621.92
05/19	Draft 1006	-\$25.84		\$106,596.08
05/19	Draft 1007	-\$58.04		\$106,538.04
05/19	Draft 1008	-\$143.79		\$106,394.25
05/19	Draft 1009	-\$6.28		\$106,387.97
05/19	Draft 1010	-\$29.34		\$106,358.63
05/19	Withdrawal Debit Card DEBIT CARD TRANS 05/18 0 3138427505 5 GOPHER FAMILY BRANDS 877-699-7927 MN	-\$1,594.10		\$104,764.53
	Ending Balance			\$104,764.53
	Dividends Paid Year to Date		\$0.00	

DATE	CHECK #	AMOUNT
05/09	1001*	\$2175.00
05/03	1002	\$289.31
05/16	1003	\$75.00

DATE	CHECK #	AMOUNT
05/09	1004	\$75.00
05/11	1005	\$100.00
05/19	1006	\$25.84



# LIFE.

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DATE	CHECK #	AMOUNT
05/19	1007	\$58.04
05/19	1008	\$143.79
05/19	1009	\$6.28
05/19	1010	\$29.34

DATE	CHECK #	AMOUNT
05/02	108	\$4786.00
05/11	110*	\$2652.26
05/02	111	\$350.00
05/15	112	\$15.05

\* Asterisk next to number indicates skip in number sequence

# Deposits

	Amount	Budget	Audit
7/14/2022	\$715.00	Uniform sale+ petty cash	X
7/15/2022	\$410.84	Uniform sale (Venmo)	X
7/15/2022	\$10.70	Uniform sale (Venmo)	X
7/21/2022	\$1,500	Sponsorships	X
08/03/2022	\$1,500	Sponsorships	X
8/10/2022	\$1,000	Sponsorships	X
8/10/2022	\$1,000	Sponsorships	X
8/10/2022	\$500	Sponsorships	X
8/10/2022	\$1,500	Sponsorships	X
8/10/2022	\$1,500	Sponsorships	X
8/10/2022	\$3	MISC (Coins found in the safe)	X
8/18/2022	\$500	Sponsorships	X
8/23/2022	\$500	Sponsorships	X
8/23/2022	\$500	Sponsorships	X
8/23/2022	\$750	Sponsorships	X
8/23/2022	\$1,500	Sponsorships	X
8/23/2022	\$1,500	Sponsorships	X
8/23/2022	\$1,500	Sponsorships	X
8/23/2022	\$1,500	Sponsorships	X
8/23/2022	\$1,500	Sponsorships	X
8/23/2022	\$1,500	Sponsorships	X
8/24/2022	\$1,500	Sponsorships	X
8/26/2022	\$1,500	Sponsorships	X
8/26/2022	\$500	Sponsorships	X
8/26/2022	\$500	Spomsorships	X
8/26/2022	\$1,500	Sponsorships	X
8/30/2022	\$1,500	Sponsorships	X
8/30/2022	\$1,500	Sponsorships	X
8/30/2022	\$500	Sponsorships	X
8/31/2022	\$1,500	Sponsorships	X
09/03/2022	\$20	Logo Shirts	X
09/06/2022	\$20	Logo Shirts	X

09/06/2022	\$12	Logo Shirts	X
09/07/2022	\$1,480	Money Drive	XX
09/07/2022	\$1,000	Sponsorships	X
09/07/2022	\$1,000	Sponsorships	XX
09/08/2022	\$696.24	Money Drive (venmo)	X
09/08/2022	\$1,500	Sponsorships	XX
09/08/2022	\$623	Money Drive	XXX
09/09/2022	\$665.71	Money Drive (venmo)	XXX
09/09/2022	\$1,500	Sponsorships	XXX
09/09/2022	\$825.00	Money Drive	X
09/09/2022	\$130	Money Drive	X
09/11/2022	\$1,631.99	Money Drive (venmo)	XX
09/12/2022	\$250	Money Drive	X
09/12/2022	\$373	Money Drive	XX
09/13/2022	\$500	Sponsorships	XXX
09/13/2022	\$1,096.96	Money Drive (venmo)	XXX
03/13/2022	\$1,204.210	Money Drive (venmo)	X
09/13/2022	\$425	Money Drive	XX
09/13/2022	\$157	Money Drive	XX
09/14/2022	\$20	Coke Rewards	X
09/14/2022	\$362	Money Drive	X
09/14/2022	\$1,195	Money Drive	X
09/14/2022	\$24.43	Money Drive (venmo)	X
09/14/2022	\$2,236.57	Money Drive (venmo)	X
09/16/2022	\$85	Money Drive	X
09/16/2022	\$955.40	Money Drive (venmo)	XX
09/16/2022	\$500	Sponsorships	X
09/21/2022	\$815	Book Fair	X
09/21/2022	\$100	Sponsorship	X
09/22/2022	\$1,412	Book Fair	X
09/22/2022	137.14	Money Drive (venmo)	XX

09/23/2022	\$100	Money Drive	X
9/23/2022	\$200	Petty cash (Book Fair)	+
9/23/2022	\$40	Petty cash (Book Fair)	X
9/27/2022	\$299.75	Denim Days	+
09/23/2022	\$1,773.33	Book Fair	+
09/29/2022	\$1.87	Denim Days (venmo)	+
10/04/2022	\$1,500	Sponsorships	X
10/04/2022	\$30	Candy Drive	X
10/04/2022	\$448	Restaurant Night (Kneaders)	X
10/04/2022	\$5	Denin Days	X
10/10/2022	\$180.49	Candy Drive (Venmo)	X
10/11/2022	\$161.27	Candy Drive (Venmo)	X
10/12/2022	\$6	Denin Days	X
10/12/2022	\$60	Candy Drive	X
10/12/2022	\$1,500	Sponsorship	X
10/13/2022	\$248.86	Candy Drive (Venmo)	X
10/13/2022	\$526.58	Sponsorships	X
10/17/2022	\$277.82	Candy Drive (Venmo)	X
10/19/2022	\$34.17	Target Reimbursement for supplies MF	+
10/19/2022	\$150	Venmo Target Purchase	+
10/19/2022	\$309.97	Candy Drive (Venmo)	+
10/21/2022	\$9.85	Target Reimbursement	X
10/23/2022	\$1,548.96	Main Fundraiser	+
10/24/2022	- \$2,529	Main Fundraiser	+
10/24/2022	\$800	Main Fundraiser (Petty Cash)	+
10/24/2022	\$493.67	Main Fundraiser (square)	+
10/24/2022	- \$2,529	Main Fundraiser	Duplicate
10/27/2022	\$185	Candy Drive	X
10/27/2022	\$20.51	Main Fundraiser (Venmo)	+
11/08/2022	\$166	Main Fundraiser (Zeppes)	X
11/08/2022	\$2,978	Dixie Direct	X

11/08/2022	\$1,220	Dixie Direct	X
11/08/2022	\$240	Dixie Direct	XX
11/10/2022	\$2	Dixie Direct	XXX
11/10/2022	\$2,685	Dixie Direct	XXXX
11/10/2022	\$1,860	Dixie Direct	XXXX
11/10/2022	\$1,220	Dixie Direct	XXXX
11/10/2022	\$640	Dixie Direct	XXXX
11/14/2022	\$1,160	Dixie Direct	XXXX
11/14/2022	\$1,220	Dixie Direct	XXXX
11/14/2022	\$2,220	Dixie Direct	XXXX
11/14/2022	\$40	Dixie Direct	XXXX
11/17/2022	\$1,640	Dixie Direct	XXXX
11/17/2022	\$1,280	Dixie Direct	XXXX
11/17/2022	\$1,660	Dixie Direct	XXXX
11/30/2022	\$500	Dixie Direct	XXXX
11/30/2022	\$1,270	Dixie Direct	XXXX
11/30/2022	\$980	Dixie Direct	XXXX
11/30/2022	\$2,580	Dixie Direct	XXXX
11/30/2022	\$480	Dixie Direct	XXXX
11/30/2022	\$680	Dixie Direct	XXXX
12/1/2022	\$478.21	Denim Days (Pajama)	X
12/14/2022	\$1,920	Dixie Direct	X
12/14/2022	\$1,020	Dixie Direct	X
12/14/2022	\$560	Dixie Direct	XX
12/14/2022	\$1,140	Dixie Direct	XX
12/14/2022	\$160	Dixie Direct	XX
12/14/2022	\$100	Dixie Direct	XX
12/14/2022	\$620	Dixie Direct	XX
12/14/2022	\$25	Denim Days (Pajama)	XX
12/14/2022	\$85.67	Dixie Direct (venmo)	X
01/09/2023	\$1,520	Dixie Direct	X

01/09/2023	\$36.20	Box tops	X
01/09/2023	\$600	Dixie Direct	XX
01/12/2023	\$52.50	SEP Dinner (costco)	XX
02/09/2023	\$60	Dixie Direct	XX
02/23/2023	\$303	Denim Days	XX
03/16/2023	\$257.74	Teacher Appreciation [1]	X
04/04/2023	\$105.55	Teacher Appreciation [2]	X
04/05/2023	\$379.91	Teacher Appreciation [3]	XX
04/06/2023	\$702	Book Fair Spring	XX
04/06/2023	\$600	Book Fair Spring	XX
04/06/2023	\$17	Denim Days	XX
04/07/2023	\$102	Teacher Appreciation [4]	XX
04/07/2023	\$6	Book Fair Spring	XX
04/20/2023	\$142.36	CWA 5	XX
04/25/2023	\$111.21	CWA 5	XX
05/11/2023	\$6.20	Box tops	

# Withdrawals

Date	Check Number	Amount	Description	Budget	Audit
07/06/2022	3388	\$12,045	Lucky Dog Recreation	Outdoor Classroom	X
07/06/2022	3390	\$8,557.50	Dixie Direct-GWA	Dixie Direct 2021	X
07/06/2022	Debit	\$200	Petty Cash	Uniform Sale	X
7/12/2022	Debit	\$16	Venmo-QRKIT	PTO Marketing Cost	X
7/19/2022	3387	\$180.34	Workstation Cart [1]	GWA Faculty Requests	X
7/20/2022	Debit	\$4,412.33	Scholastic	Book Fair Fall	X
8/8/2022	Debit	\$46.01	Walmart	Back to School Night	X
8/9/2022	Debit	\$113.58	JoAnns	Back to School Night	X
8/10/2022	Debit	\$0.68	Fedex	Back to School Night	X
8/10/2022	Debit	\$2.50	Library	Back to School Night	X
8/11/2022	3389	\$150.00	WCSD- Crimson	Main Fundraiser	X
8/11/2022	Debit	\$500	Fizz Gift Cards	Leader in me incentives	X
8/12/2022	Debit	\$100	Chick-fill-A	Leader in me incentives	X
8/18/2022	Debit	\$400	Chick-fill-A	Leader in me incentives	X
9/1/2022	Debit	\$144	Madsen's Printhouse [2]	Money Drive	X
9/1/2022	3393	\$10,500	Lucky Dog Recreation	Outdoor Classroom	X
9/6/2022	Debit	\$17.35	Dollar Tree	Money Drive	X
9/8/2022	Debit	\$5,277	Madsen's Printhouse	Logo Shirts	X
09/08/2022	Debit	\$582.50	Zupas	SEP Dinners	X
09/19/2022	Debit	\$184	Zupas	SEP Dinners	X
09/19/2022	Debit	\$200	Petty Cash	Book Fair	X
09/21/2022	Debit	\$40	Petty Cash	Book Fair	X
09/25/2022	Debit	\$1,000.00	Madsen's Printhouse [3]	Sponsorship	X
09/29/2022	Debit	\$8.75	Plates and Napkins	Money Drive	X
09/29/2022	Debit	\$130	Giftcards [4]	Money Drive	X
10/02/2022	Debit	\$120.50	Pizza for Winner Class	Money Drive	X
10/05/2022	3391	\$3,021.56	Scholastic	Book Fair	X
10/05/2022	Debit	\$119.40	Canva	Marketing Cost	NEED approval
10/04/2022	Debit	\$1,035.50	Madsen's Printhouse (Banners \$120)	Logo Shirts	X
10/18/2022	Debit	\$190.65	Target	Main Fundraisers	X
10/18/2022	Debit	\$275.50	Madsen's Printhouse (Banner \$160)	Logo Shirts	X



10/19/2022	Debit		\$3.86	Walmart [5]	Main Fundraisers	X	
10/19/2022	Debit		\$8.88	Walmart [6]	Main Fundraisers	X	
10/21/2022	Debit		\$800	Petty Cash	Main Fundraisers	X	
10/21/2022		3394	\$974.10	Scholastic	Book Fair	X	
10/23/2022	Debit		\$6.67	Dollar Tree	Main Fundraiser	X	
10/26/2022		3395	\$550	Platinum Sports Group [7]	Main Fundraiser	X	1
10/27/2022		3396	\$169.67	Reinburstment to Sharon Moss (Amaz	Main Fundraiser	X	
10/27/2022		3397	\$910.09	Reinbursment to Alisha Madsen [9]	Money Drive	X	1
10/27/2022		3398	\$2,004.87	Reinburstment to Alisha Madsen [10]	Main Fundraiser	X	1
10/27/2022		3399	\$555.87	Flyers [11]	Main Fundraiser	X	
10/27/2022		3400	\$100	Pie Face Incentive (Wellhoff)	Main Fundraiser	X	
10/28/2022	Debit		\$2,729	Red Rover	Main Fundraiser	X	
11/3/2022		3401	\$125	Custodians [12]	Main Fundraiser	X	
11/3/2022		3402	\$125	Custodians [13]	Main Fundraiser	X	
11/3/2022		3404	\$75	Gift Cards [14]	Main Fundraiser	X	
11/17/2022	Debit		\$275	Lin's Donuts	Parent Appreciation Events	X	
12/14/2022	Debit		\$20.27	Amazon [15]	Parent Appreciation Events	X	
12/18/2022	Debit		\$55.08	Donut Run	Parent Appreciation Events	X	
12/19/2022		3405	\$60.25	Little Caesars [16]	Main Fundraiser	X	
12/16/2022	Debit		\$375	Got Poop	Main Fundraiser	X	
01/10/2023	Debit		\$60	Dixie direct (Venmo)	Dixie direct	X	
01/10/2023	Debit		\$16,600	Dixie Direct ( payment)	Dixie Direct	X	
01/10/2023	Debit		\$72.95	Lin's	SEP Dinner	X	
01/11/2023	Debit		\$16.12	Lin's	SEP Dinner	X	
01/12/2023	Debit		\$65	Costco	SEP Dinner	X	
01/12/2023	Debit		\$40	Costco	SEP Dinner	X	
01/12/2023	Debit		\$0.54	Costco	SEP Dinner	X	
01/12/2023	Debit		\$40.41	Viva Chicken	SEP Dinner	X	
01/13/2023	Debit		\$893	Viva Chicken	SEP Dinner	X	
01/17/2023	Debit		\$10.66	Instacart [17]	SEP Dinner	X	
02/10/2023	Check 101		\$175.75	Candy cups, spoons [18]	Parent Appreciation Events	X	

02/10/2023	Debit	\$51.00	Fiesta Fun [19]	GWA Faculty Requests	X
02/22/2023	Debit	\$50.00	Megaplex [20]	GWA Faculty Requests	X
02/22/2023	Debit	\$50.00	Dixie Bowl [21]	GWA Faculty Requests	X
02/22/2023	Debit	\$144.68	Harland Clarke [22]	PTO Marketing Cost	X
02/22/2023	Debit	\$1,889.43	Gopher [23]	GWA Faculty Requests	X
02/28/2023	Debit	\$50.00	Fiesta Fun [24]	GWA Faculty Requests	X
02/28/2023	Debit	\$50.00	House of Jump [25]	GWA Faculty Requests	X
03/07/2023	Debit	\$49.13	JoAnn	Teacher Appreciation	X
03/07/2023	Debit	\$218.16	Costco	Teacher Appreciation	X
03/07/2023	Debit	\$101.97	ChefStore	Teacher Appreciation	X
03/07/2023	Debit	\$744.47	Legacy Events [26]	Field Day	X
03/10/2023	Debit	\$975	Big Lud's BBQ	Teacher Appreciation	X
03/10/2023	Debit	\$1,126.13	Big Lud's BBQ	Teacher Appreciation	X
03/12/2023	Debit	\$294.46	Sunrise Press [27]	Parent Appreciation	X
03/30/2023	Debit	\$10	Fizz Gift Cards	Art Competition	X
03/31/2023	Debit	\$131.35	Five Below	Art Competition	X
03/31/2023	Debit	\$5.34	Target	Art Competition	X
03/31/2023	Debit	\$20	Megaplex	Art Competition	X
04/04/2023	Check103	\$26.67	Costco [28]	Teacher Appreciation	X
04/04/2023	Check 104	\$132.69	Costco [29]	Teacher Appreciation	X
04/04/2023	Debit	\$200.00	Petty Cash	Book Fair Spring	X
4/6/2023	Debit	\$237.58	Lin's [30]	SEP Dinner	X
4/6/2023	Debit	\$628.35	Jimmy John's [31]	SEP Dinner	X
04/07/2023	Debit	\$12.80	Amazon [32]	Family Appreciation Night	X
04/07/2023	Debit	\$281.59	Amazon [33]	Family Appreciation Night	X
04/11/2023	Debit	\$101.83	Walmart [34]	Teacher Appreciation	X
04/12/2023	Debit	\$15	Smith's [35]	Teacher Appreciation	X
04/12/2023	Debit	\$112.08	Costco [36]	Teacher Appreciation	X
04/13/2023	Debit	\$20.58	Lin's [37]	Teacher Appreciation	X
04/14/2023	Check #106	\$235.86	Costco [38]	Teacher Appreciation	X
04/24/2023	Debit	\$10.13	Amazon [39]	Field Day	X

04/24/2023	Debit	\$221.32	Amazon [40]	Field Day	X
04/25/2023	Debit	\$115.28	Amazon [41]	Field Day	X
04/25/2023 Check 109 \$114.21 GWA- Frozen Pla [42]					X
04/26/2023	Debit	\$234.78	Amazon [43]	Field Day	X
04/25/2023	Debit	\$8.50	Harbor Freight [44]	PTO Marketing Cost	X
04/25/2023	Debit	\$8.22	Costco [45]	Family Appreciation Night	X
04/28/2023	Debit	\$39.49	Amazon [46]	PTO Marketing Cost	X
05/01/2023	Debit	\$200	Fizz Drinks [47]	GWA gives back	X
05/01/2023	Debit	\$200	Quench IT [48]	GWA gives back	X
05/01/2023	Debit	\$17.07	Amazon [49]	PTO Marketing Cost	X
05/02/2023	check 0108	\$4,786.00	Larsen Plumbing	Money Drive	X
05/02/2023	check 0111	\$350 [50]	Ratpaq LLC	Family Appreciation Night	X
05/03/2023 Check 1002 \$239.31 GWA- GWA gives Back [51]					X
05/03/2023	Debit	13.85	US Postal Service [52]	PTO marketing Cost	X
05/03/2023	Debit	\$31.69	Walmart [53]	7th Graduation	X
05/03/2023	Debit	21.35	Dollar Tree [54]	7th Graduation	X
05/04/2023	Debit	24.26	Amazon [55]	7th Graduation	X
05/04/2023	Debit	30.92	Amazon [56]	Kindergarten Graduation	X
05/04/2023	Debit	8.53	Amazon [57]	7th Graduation	X
05/09/2023	Check 1001	\$2,175	Zeppes	Family Appreciation Night	X
05/09/2023	Check 1004	\$75	Custodians [58]	Family Appreciation Night	X
05/09/2023	Debit	\$15	Steamrollers	Kindergarten Graduation	X
05/10/2023	Debit	\$21.06	Amazon	Kindergarten Graduation	X
05/11/2023	Debit	\$21.63	Walmart [59]	7th Grade Graduation	X
05/11/2023	Check 0110	\$2,652	Scholastic	Book Fair Spring	X
05/11/2023	Check 1005	\$100	Cinna-roller [60]	Middle School	X
05/11/2023	Debit	\$21.06	Amazon [61]	Kindergarten Graduation	X
05/11/2023	Debit	\$21.06	Amazon [62]	Kindergarten Graduation	X
05/11/2023	Debit	\$21.06	Amazon [63]	Kindergarten Graduation	X
05/11/2023	Debit	\$21.06	Amazon [64]	Kindergarten Graduation	X
05/11/2023	Debit	\$1,014.00	Megaplex	Middle School	X

05/11/2023	Debit	\$377.97	Fiesta Fun	Give Me Liberty	X
05/15/2023	Check 112	\$15.05	Little Caesars [65]	Family Appreciation Night	X
05/16/2023	Check 1003	\$75	Custodians [66]	Family Appreciation Night	X
05/19/2023	Check 1006	\$25.84	Amazon [67]	Art Competition	X
05/19/2023	Cehck 1007	\$58.04	Shein [68]	Kindergarten Graduation	X
05/19/2023	Check 1008	143.79	Walmart [69]	Middle School	X
05/19/2023	Check 1009	\$6.28	Walmart [70]	Field Day	X
05/19/2023	Check 1010	\$29.34	Walmart [71]	Give Me Liberty	X
05/19/2023	Debit	\$1,594.10	Gopher [72]	Money Drive	X
05/30/2023	Check 1012	\$188.89	Reimbursement to Amber Corkin [73]	Field Day	

CHARTWAY FCU  
 5700 CLEVELAND ST.  
 VIRGINIA BEACH VA 23462

# TAX YEAR 2022

Form 1099-INT OMB No. 1545-0112

**RETURN SERVICE REQUESTED**  
 Customer Service Telephone Number: 800-678-8765

Copy B For Recipient

## Important Tax Information Enclosed

Department of the Treasury - Internal Revenue Service  
[www.irs.gov/form1099int](http://www.irs.gov/form1099int)  
 (Keep for your records)

115007-25A\*\*11208  
  
 GEORGE WASHINGTON ACADEMY PARENT TEACHER  
 2277 S 3000 E  
 SAINT GEORGE UT 84790-8510

This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

RECIPIENT'S TIN	XX-XXX2639
--------------------	------------

PAYER'S Federal Identification Number: 54-0674620

## FORM 1099-INT • INTEREST INCOME • 2022

	(Box 1)	(Box 2)	(Box 3)	(Box 4)	(Box 5)	(Box 6)	(Box 7)
Account Number (see instructions)	Interest income	Early withdrawal penalty	Interest on U.S. Savings Bonds and Treas. obligations	Federal income tax withheld	Investment expenses	Foreign tax paid	Foreign country or U.S. possession
Summary	\$57.85						

### Breakdown of 1099-INT information by account:

Account Name:							
0001132102	\$57.85						



Letter Issue Date  
January 3, 2023

Letter ID  
L0316249760

Account Type  
Sales and Use Tax (STC)

Account ID  
12267756-002-STC

GEORGE WASHINGTON ACADEMY PTO  
GEORGE WASHINGTON ACADEMY PARENT TECHER  
ORGAN  
2297 S 3000 E  
SAINT GEORGE UT 84790-8510

**TC-62N - Sales Tax Refund Booklet for Religious or Charitable Organizations**

rTL026  
TC-62N\_1.ai Rev 10/15

**General Information**

The sales tax exemption for purchases made by religious or charitable institutions is allowed in the following manner:

1. The exemption is taken at the point of purchase if the purchase is \$1,000 or more.
2. If the purchase is less than \$1,000, the exemption is taken by claiming a refund from the Tax Commission.
3. If the sale is made by a public utility to a religious or charitable institution, the exemption must be taken at the point of purchase.
4. If a contract exists between the seller and the religious or charitable institution, the exemption may be taken at the point of purchase regardless of the dollar amount of the sale.

**Instructions for TC-62N**

Institutions are issued 12 refund coupons per year. Coupons may be filed on a monthly basis. Any coupons not used during the year should be discarded.

Add the Utah sales tax paid that qualifies for the refund and write the total in the box marked Refund Amount.

Do not attach receipts to the refund coupon. Receipts and other original supporting records must be kept for three years following the date of refund.

Refund requests must be filed within three years of the date of purchase, pursuant to Utah Code §59-12-110.

If the information on the coupon is wrong, please correct any errors or make changes on the change form at the bottom of this page.

**Please file the original coupon.**

See [tax.utah.gov](http://tax.utah.gov) for more information and access to forms, publications and online services. Email questions to [taxmaster@utah.gov](mailto:taxmaster@utah.gov). You may also write or visit the Tax Commission at 210 N 1950 W, Salt Lake City, UT 84134-3212, or call 801-297-2200 or 1-800-662-4335 toll free.

If you need an accommodation under the Americans with Disabilities Act, email [taxada@utah.gov](mailto:taxada@utah.gov), or call 801-297-3811 or TDD 801-297-2020. Please allow three working days for a response.

**Change Form for Preprinted Information**

TC-62N\_4.ai

<b>Change in Business Name</b>			<b>Business Discontinued</b>		
New name:			Effective date:		
<b>Change in Mailing Address</b>			<b>Change in Business Address</b>		
Name			Business name		
New address			New address		
City	State	ZIP code	City	State	ZIP code
Account number		Telephone number	Account number		Telephone number
<b>Request for New Application</b> Complete this section only when changing ownership status					
Business name				Contact person	
Address			City	State	ZIP code

1005010211

0005020211



TC-62N Rev. 10/15

GEORGE WASHINGTON ACADEMY PTO

# Utah Sales Tax Refund Request - TC-62N

rL026

S  
C  
O

Tax Type
<b>Sales and Use Tax</b>

Sales and Use Account ID
<b>12267756-002-STC</b>

Period Ending
<b>Jan 2023</b>

Refund Amount:

--	--

UTAH STATE TAX COMMISSION  
 SALES TAX  
 210 N 1950 W  
 SLC UT 84134-3212

I declare under penalty of perjury that to the best of my knowledge and belief this information is correct and complete.

Authorized signature \_\_\_\_\_

Date \_\_\_\_\_

Telephone \_\_\_\_\_

238990003412267756002STC701312023303400000000000

TC-62N Rev. 10/15

GEORGE WASHINGTON ACADEMY PTO

# Utah Sales Tax Refund Request - TC-62N

rL026

S  
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Tax Type
<b>Sales and Use Tax</b>

Sales and Use Account ID
<b>12267756-002-STC</b>

Period Ending
<b>Feb 2023</b>

Refund Amount:

--	--

UTAH STATE TAX COMMISSION  
 SALES TAX  
 210 N 1950 W  
 SLC UT 84134-3212

I declare under penalty of perjury that to the best of my knowledge and belief this information is correct and complete.

Authorized signature \_\_\_\_\_

Date \_\_\_\_\_

Telephone \_\_\_\_\_

238990003412267756002STC702282023803400000000000

TC-62N Rev. 10/15

GEORGE WASHINGTON ACADEMY PTO

# Utah Sales Tax Refund Request - TC-62N

rL026

S  
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O

Tax Type
<b>Sales and Use Tax</b>

Sales and Use Account ID
<b>12267756-002-STC</b>

Period Ending
<b>Mar 2023</b>

Refund Amount:

--	--

UTAH STATE TAX COMMISSION  
 SALES TAX  
 210 N 1950 W  
 SLC UT 84134-3212

I declare under penalty of perjury that to the best of my knowledge and belief this information is correct and complete.

Authorized signature \_\_\_\_\_

Date \_\_\_\_\_

Telephone \_\_\_\_\_

238990003412267756002STC703312023903400000000000



0005030211



TC-62N Rev. 10/15

GEORGE WASHINGTON ACADEMY PTO

# Utah Sales Tax Refund Request - TC-62N

rL026

Tax Type
<b>Sales and Use Tax</b>

Sales and Use Account ID
<b>12267756-002-STC</b>

Period Ending
<b>Apr 2023</b>

S  
C  
O

Refund Amount:

--	--

UTAH STATE TAX COMMISSION  
 SALES TAX  
 210 N 1950 W  
 SLC UT 84134-3212

I declare under penalty of perjury that to the best of my knowledge and belief this information is correct and complete.

\_\_\_\_\_  
Authorized signature

\_\_\_\_\_  
Date Telephone

238990003412267756002STC704302023903400000000000

TC-62N Rev. 10/15

GEORGE WASHINGTON ACADEMY PTO

# Utah Sales Tax Refund Request - TC-62N

rL026

Tax Type
<b>Sales and Use Tax</b>

Sales and Use Account ID
<b>12267756-002-STC</b>

Period Ending
<b>May 2023</b>

S  
C  
O

Refund Amount:

--	--

UTAH STATE TAX COMMISSION  
 SALES TAX  
 210 N 1950 W  
 SLC UT 84134-3212

I declare under penalty of perjury that to the best of my knowledge and belief this information is correct and complete.

\_\_\_\_\_  
Authorized signature

\_\_\_\_\_  
Date Telephone

238990003412267756002STC705312023503400000000000

TC-62N Rev. 10/15

GEORGE WASHINGTON ACADEMY PTO

# Utah Sales Tax Refund Request - TC-62N

rL026

Tax Type
<b>Sales and Use Tax</b>

Sales and Use Account ID
<b>12267756-002-STC</b>

Period Ending
<b>Jun 2023</b>

S  
C  
O

Refund Amount:

--	--

UTAH STATE TAX COMMISSION  
 SALES TAX  
 210 N 1950 W  
 SLC UT 84134-3212

I declare under penalty of perjury that to the best of my knowledge and belief this information is correct and complete.

\_\_\_\_\_  
Authorized signature

\_\_\_\_\_  
Date Telephone

238990003412267756002STC706302023503400000000000

0005040211



TC-62N Rev. 10/15

GEORGE WASHINGTON ACADEMY PTO

# Utah Sales Tax Refund Request - TC-62N

rL026

S  
C  
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Tax Type
<b>Sales and Use Tax</b>

Sales and Use Account ID
<b>12267756-002-STC</b>

Period Ending
<b>Jul 2023</b>

Refund Amount:

--	--

UTAH STATE TAX COMMISSION  
 SALES TAX  
 210 N 1950 W  
 SLC UT 84134-3212

I declare under penalty of perjury that to the best of my knowledge and belief this information is correct and complete.

Authorized signature

Date

Telephone

238990003412267756002STC707312023103400000000000

TC-62N Rev. 10/15

GEORGE WASHINGTON ACADEMY PTO

# Utah Sales Tax Refund Request - TC-62N

rL026

S  
C  
O

Tax Type
<b>Sales and Use Tax</b>

Sales and Use Account ID
<b>12267756-002-STC</b>

Period Ending
<b>Aug 2023</b>

Refund Amount:

--	--

UTAH STATE TAX COMMISSION  
 SALES TAX  
 210 N 1950 W  
 SLC UT 84134-3212

I declare under penalty of perjury that to the best of my knowledge and belief this information is correct and complete.

Authorized signature

Date

Telephone

238990003412267756002STC708312023903400000000000

TC-62N Rev. 10/15

GEORGE WASHINGTON ACADEMY PTO

# Utah Sales Tax Refund Request - TC-62N

rL026

S  
C  
O

Tax Type
<b>Sales and Use Tax</b>

Sales and Use Account ID
<b>12267756-002-STC</b>

Period Ending
<b>Sep 2023</b>

Refund Amount:

--	--

UTAH STATE TAX COMMISSION  
 SALES TAX  
 210 N 1950 W  
 SLC UT 84134-3212

I declare under penalty of perjury that to the best of my knowledge and belief this information is correct and complete.

Authorized signature

Date

Telephone

238990003412267756002STC709302023903400000000000

0005050211

# Utah Sales Tax Refund Request - TC-62N

rtL026

TC-62N Rev. 10/15

GEORGE WASHINGTON ACADEMY PTO

Tax Type
<b>Sales and Use Tax</b>

Sales and Use Account ID
<b>12267756-002-STC</b>

Period Ending
<b>Oct 2023</b>

S  
C  
O

Refund Amount:

--	--

UTAH STATE TAX COMMISSION  
 SALES TAX  
 210 N 1950 W  
 SLC UT 84134-3212

I declare under penalty of perjury that to the best of my knowledge and belief this information is correct and complete.

Authorized signature

Date

Telephone

238990003412267756002STC710312023403400000000000

# Utah Sales Tax Refund Request - TC-62N

rtL026

TC-62N Rev. 10/15

GEORGE WASHINGTON ACADEMY PTO

Tax Type
<b>Sales and Use Tax</b>

Sales and Use Account ID
<b>12267756-002-STC</b>

Period Ending
<b>Nov 2023</b>

S  
C  
O

Refund Amount:

--	--

UTAH STATE TAX COMMISSION  
 SALES TAX  
 210 N 1950 W  
 SLC UT 84134-3212

I declare under penalty of perjury that to the best of my knowledge and belief this information is correct and complete.

Authorized signature

Date

Telephone

238990003412267756002STC711302023403400000000000

# Utah Sales Tax Refund Request - TC-62N

rtL026

TC-62N Rev. 10/15

GEORGE WASHINGTON ACADEMY PTO

Tax Type
<b>Sales and Use Tax</b>

Sales and Use Account ID
<b>12267756-002-STC</b>

Period Ending
<b>Dec 2023</b>

S  
C  
O

Refund Amount:

--	--

UTAH STATE TAX COMMISSION  
 SALES TAX  
 210 N 1950 W  
 SLC UT 84134-3212

I declare under penalty of perjury that to the best of my knowledge and belief this information is correct and complete.

Authorized signature

Date

Telephone

238990003412267756002STC712312023003400000000000



## PROPOSAL FOR BOARD ACTION

**Proposal Title:** FY23 Final Budget Approval

**Submitted by:** Spencer Adams

**Originating Committee:** Finance Committee

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

### **Situation:**

Each year we need to approve an initial budget at the end of the prior fiscal year.

### **Background Information, including a list of reviewing committees:**

### **Assessment:**

The proposed final budget has been vetted by the finance committee and provides a forecast that better aligns with what we believe will happen while being conservative for any unforeseen expenses that may arise.

### **Recommendation:**

It is recommended that the forecast column of the FY23 final budget be approved.

Please submit this form with all accompanying paperwork to the Board Secretary, Deborah Odenwalder, at [dodenwalder@gwacademy.org](mailto:dodenwalder@gwacademy.org) by the 15<sup>th</sup> day of the month of the Board meeting.



## PROPOSAL FOR BOARD ACTION

**Proposal Title:** FY24 Original Budget Approval

**Submitted by:** Spencer Adams

**Originating Committee:** Finance Committee

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

### **Situation:**

Each year we need to approve an initial budget at the end of the prior fiscal year.

### **Background Information, including a list of reviewing committees:**

### **Assessment:**

The proposed original budget has been vetted by the finance committee and provides a forecast that reflects the increases made in the State's legislative session along with the approved salary increases made earlier in the year for next school year. It has also taken into account future plans for different programs, technology and curriculum purchases.

### **Recommendation:**

It is recommended that the forecast column of the FY24 initial budget be approved.

Please submit this form with all accompanying paperwork to the Board Secretary, Deborah Odenwalder, at [dodenwalder@gwacademy.org](mailto:dodenwalder@gwacademy.org) by the 15<sup>th</sup> day of the month of the Board meeting.

# Budget Detail Report

Actuals as of: **May 31, 2023** Percentage of Year: 91.7%



	(1021 Students)		(998 Students)		(1011 Students)		(1013 Students)		(1010 Students)		1005			(2 Students)		1000	
	FY19 Actuals	FY20 Actuals	FY21 Actuals	FY22 Actuals	Current Yr Actuals	Approved Budget	Changes	Forecast	% of Forecast	Changes	FY24 Proposed Budget						
<b>Revenue</b>																	
<b>1000 Revenue From Local Sources</b>																	
1510 Interest	\$ 100,557	\$ 103,796	\$ 42,831	\$ 36,256	\$ 222,417	\$ 33,500	\$ 222,500	\$ 256,000	86.9%	\$ (93,000)	\$ 163,000						
1600 Food Services	\$ 213,834	\$ 173,710	\$ 83,722	\$ 33,519	\$ 218,341	\$ 175,000	\$ 43,341	\$ 218,341	100.0%	\$ 11,659	\$ 230,000						
1741 Student Activities and Fees	\$ 24,702	\$ 11,786	\$ 17,152	\$ 8,332	\$ 1,953	\$ 6,000	\$ (4,000)	\$ 2,000	97.7%	\$ -	\$ 2,000						
1741 Textbook and Library Fees	\$ -	\$ -	\$ -	\$ 229	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -						
1920 Donations	\$ 187	\$ 3,201	\$ 13,290	\$ 11,497	\$ 14,778	\$ 6,349	\$ 8,429	\$ 14,778	100.0%	\$ (10,778)	\$ 4,000						
1920 GWA Gives Back	\$ 1,617	\$ -	\$ 2,014	\$ 5,009	\$ 1,289	\$ -	\$ 1,289	\$ 1,289	100.0%	\$ (1,289)	\$ -						
1920 Background Checks	\$ 1,114	\$ 754	\$ 1,164	\$ 1,496	\$ 1,230	\$ 1,200	\$ 30	\$ 1,230	100.0%	\$ (30)	\$ 1,200						
1920 Staff Lounge	\$ 2,941	\$ 2,516	\$ 3,041	\$ 2,723	\$ 2,359	\$ 3,000	\$ -	\$ 3,000	78.6%	\$ -	\$ 3,000						
1920 Dixie Direct Fundraiser	\$ -	\$ -	\$ -	\$ -	\$ 8,480	\$ -	\$ 8,558	\$ 8,558	99.1%	\$ -	\$ 8,558						
1930 Sales of Assets	\$ -	\$ 4,090	\$ 620	\$ 6,573	\$ 14,895	\$ 1,000	\$ 13,895	\$ 14,895	100.0%	\$ (13,895)	\$ 1,000						
1990 Miscellaneous Income	\$ -	\$ -	\$ -	\$ 5,319	\$ 5,921	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -						
<b>Total 1000:</b>	<b>\$ 344,952</b>	<b>\$ 299,853</b>	<b>\$ 163,834</b>	<b>\$ 110,953</b>	<b>\$ 491,663</b>	<b>\$ 226,049</b>	<b>\$ 294,042</b>	<b>\$ 520,091</b>	<b>94.5%</b>	<b>\$ (107,333)</b>	<b>\$ 412,758</b>						
<b>3000 Revenue From State Sources MSP</b>																	
30-3005 Regular School Program K			\$ 263,961	\$ 277,873	\$ 267,157	\$ 297,672	\$ (6,228)	\$ 291,444	91.7%	\$ 188,771	\$ 480,215						
30-3010 Regular School Program 1-12	\$ 2,931,657	\$ 3,053,423	\$ 2,865,100	\$ 3,011,210	\$ 2,903,646	\$ 3,226,515	\$ (61,558)	\$ 3,164,957	91.7%	\$ 162,848	\$ 3,327,805						
30-3020 Professional Staff	\$ 191,803	\$ 205,196	\$ 219,461	\$ 230,673	\$ 201,927	\$ 226,817	\$ (7,724)	\$ 219,093	92.2%	\$ 40,007	\$ 259,100						
31-1205 Sped Educ Reg Add-On WPUS	\$ 367,105	\$ 388,892	\$ 1,160,319	\$ 358,660	\$ 414,092	\$ 372,386	\$ 79,350	\$ 451,736	91.7%	\$ -	\$ 451,736						
31-1210 Sped Educ Reg Self Contained	\$ 21,709	\$ 37,714	\$ 31,025	\$ 31,022	\$ 36,974	\$ 31,025	\$ 9,310	\$ 40,335	91.7%	\$ -	\$ 40,335						
31-1220 Sped Educ Extended Year Program	\$ 3,436	\$ 3,451	\$ 3,331	\$ 2,259	\$ 3,411	\$ 3,331	\$ 390	\$ 3,721	91.7%	\$ -	\$ 3,721						
31-1225 Sped Educ State Programs	\$ 6,256	\$ 6,272	\$ 5,557	\$ 5,997	\$ 6,742	\$ 5,557	\$ 1,798	\$ 7,355	91.7%	\$ -	\$ 7,355						
31-1278 Sped Educ Stipends Extended Year	\$ 2,000	\$ 3,047	\$ 2,912	\$ 1,904	\$ 672	\$ 784	\$ (112)	\$ 672	100.0%	\$ -	\$ 672						
31-5201 Class Size Reduction K-8	\$ 307,908	\$ 322,363	\$ 328,411	\$ 351,803	\$ 342,822	\$ 345,922	\$ 28,099	\$ 374,021	91.7%	\$ 14,075	\$ 388,096						
31-5344 Enhancement for At-Risk Student	\$ 34,021	\$ 39,192	\$ 40,663	\$ 64,658	\$ 84,274	\$ 63,577	\$ 28,358	\$ 91,935	91.7%	\$ 29,712	\$ 121,647						
31-5901 Career and Tech Ed Dist. Add-On	\$ 5,226	\$ 5,219	\$ 5,668	\$ 5,580	\$ 5,897	\$ -	\$ 190	\$ 6,087	91.7%	\$ (30)	\$ 6,057						
31-5903 CTE Comprehensive Counseling			\$ -	\$ 20,000	\$ 18,333	\$ 19,666	\$ 334	\$ 20,000	91.7%	\$ (20,000)	\$ -						
32-0500 Charter School Admin-Costs Base Funding	\$ 102,100	\$ 98,205	\$ 15,000	\$ 96,528	\$ 86,728	\$ 94,914	\$ (301)	\$ 94,613	91.7%	\$ 20,387	\$ 115,000						
32-5619 Charter School Local Replacement	\$ 2,283,977	\$ 2,401,717	\$ 2,590,182	\$ 2,746,917	\$ 2,712,083	\$ 2,899,000	\$ 59,636	\$ 2,958,636	91.7%	\$ 115,364	\$ 3,074,000						
32-5651 Educator Professional Time			\$ -	\$ -	\$ 86,875	\$ -	\$ 86,875	\$ 86,875	100.0%	\$ -	\$ 86,875						
32-5653 Public Ed Capital & Technology			\$ -	\$ -	\$ 128,603	\$ -	\$ 128,603	\$ 128,603	100.0%	\$ (128,603)	\$ -						
33-5641 Early Intervention - OEK			\$ 75,000	\$ 152,652	\$ 137,500	\$ 152,652	\$ (2,652)	\$ 150,000	91.7%	\$ (150,000)	\$ -						
33-5805 Early Literacy	\$ 32,158	\$ 34,205	\$ 36,810	\$ 51,450	\$ 29,411	\$ 50,590	\$ (18,680)	\$ 31,910	92.2%	\$ (159)	\$ 31,751						
34-5642 Elementary School Counselor Grant			\$ -	\$ 50,000	\$ 50,000	\$ 50,000	\$ -	\$ 50,000	100.0%	\$ -	\$ 50,000						
34-5807 Teacher Salary Supplement Program	\$ 4,876	\$ 8,391	\$ 6,397	\$ 3,570	\$ 3,570	\$ -	\$ 3,570	\$ 3,570	100.0%	\$ (3,570)	\$ -						
34-5868 Teacher Supplies and Materials	\$ 8,298	\$ 8,117	\$ 7,815	\$ 7,415	\$ 7,372	\$ 7,415	\$ (43)	\$ 7,372	100.0%	\$ (37)	\$ 7,335						
34-5876 Educator Salary Adjustment	\$ 257,973	\$ 256,148	\$ 252,237	\$ 248,457	\$ 239,059	\$ 248,457	\$ 12,335	\$ 260,792	91.7%	\$ 248,208	\$ 509,000						
34-5911 ELL Software			\$ 7,800	\$ 6,632	\$ 4,226	\$ -	\$ 4,226	\$ 4,226	100.0%	\$ (1,439)	\$ 2,787						
35-5420 School Land Trust Program	\$ 108,486	\$ 125,697	\$ 134,040	\$ 134,357	\$ 137,330	\$ 137,145	\$ 185	\$ 137,330	100.0%	\$ 7,133	\$ 144,463						
35-5655 Digital Teaching & Learning	\$ 1,346	\$ -	\$ 42,622	\$ 62,886	\$ -	\$ 58,919	\$ 1,917	\$ 60,836	0.0%	\$ (31,836)	\$ 29,000						
35-5666 Professional Learning Grant			\$ -	\$ -	\$ 8,280	\$ -	\$ 9,033	\$ 9,033	91.7%	\$ (126)	\$ 8,907						
35-5678 TSSA	\$ -	\$ 128,688	\$ 135,571	\$ 165,244	\$ 182,218	\$ 163,633	\$ 42,027	\$ 205,660	88.6%	\$ 25,389	\$ 231,049						
35-5679 School Based Mental Health Grant	\$ -	\$ 40,898	\$ 56,155	\$ 54,851	\$ 55,474	\$ 54,851	\$ 623	\$ 55,474	100.0%	\$ 275	\$ 55,749						
35-5810 Library Books & Elective Resources	\$ 1,205	\$ 1,201	\$ 1,064	\$ 1,067	\$ 978	\$ 1,049	\$ 18	\$ 1,067	91.7%	\$ (5)	\$ 1,062						
Library ARPA Physical Collection Grant			\$ -	\$ 2,000	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -						
Children & Teen Enhancement Grant			\$ 3,000	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -						
38-5654 Period Products in Schools			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -						
38-5673 Substance Prevention	\$ -	\$ -	\$ -	\$ 2,333	\$ 4,000	\$ 2,294	\$ 1,706	\$ 4,000	100.0%	\$ (20)	\$ 3,980						
38-5674 Elementary Suicide Prevention	\$ -	\$ -	\$ 1,566	\$ 1,000	\$ 1,000	\$ 1,000	\$ -	\$ 1,000	100.0%	\$ (5)	\$ 995						
38-5697 LETRS Professional Development Grant			\$ -	\$ -	\$ 48,637	\$ -	\$ 48,637	\$ 48,637	100.0%	\$ (48,637)	\$ -						
38-8070 School Lunch (Liquor Tax)	\$ 63,025	\$ 77,356	\$ 122,058	\$ 121,242	\$ 78,522	\$ 70,000	\$ 30,000	\$ 100,000	78.5%	\$ (10,000)	\$ 90,000						
19-5601 Beverly Taylor Sorenson Grant	\$ 25,035	\$ 23,601	\$ 24,269	\$ 26,541	\$ 26,231	\$ 27,611	\$ -	\$ 27,611	95.0%	\$ 2,722	\$ 30,333						
<b>Total 3000:</b>	<b>\$ 6,759,600</b>	<b>\$ 7,268,993</b>	<b>\$ 8,438,075</b>	<b>\$ 8,296,299</b>	<b>\$ 8,313,727</b>	<b>\$ 8,618,679</b>	<b>\$ 479,922</b>	<b>\$ 9,098,601</b>	<b>91.4%</b>	<b>\$ 460,424</b>	<b>\$ 9,559,025</b>						
<b>4000 Revenue From Federal Sources</b>																	
42-7210 ESSER CARES	\$ -	\$ -	\$ 56,316	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -						
42-7215 ESSER II CARES			\$ 130,770	\$ 45,009	\$ 22,140	\$ 29,231	\$ -	\$ 29,231	75.7%	\$ (29,231)	\$ -						
42-7220 GEERS	\$ -	\$ -	\$ 19,130	\$ 22,714	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -						
42-7225 ESSER III ARP			\$ -	\$ 448,374	\$ 33,005	\$ 54,000	\$ -	\$ 54,000	61.1%	\$ (54,000)	\$ -						
45-7280 Corona Relief Grant	\$ -	\$ -	\$ 24,899	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -						
45-7522 IDEA Pre-School	\$ 2,017	\$ 2,116	\$ 2,061	\$ 2,588	\$ -	\$ 2,588	\$ (260)	\$ 2,328	0.0%	\$ -	\$ 2,328						
45-7524 IDEA Flow-Through	\$ 70,697	\$ 15,363	\$ 133,727	\$ 141,461	\$ -	\$ 141,461	\$ (2,087)	\$ 139,374	0.0%	\$ -	\$ 139,374						
45-8075 National School Lunch Program	\$ 37,122	\$ 40,074	\$ 45,546	\$ 46,614	\$ 84,058	\$ 40,000	\$ 49,000	\$ 89,000	94.4%	\$ (9,000)	\$ 80,000						
45-8075 Free & Reduced Reimbursement	\$ 96,523	\$ 112,678	\$ 305,213	\$ 545,496	\$ 99,229	\$ 115,000	\$ -	\$ 115,000	86.3%	\$ -	\$ 115,000						
45-8075 School Breakfast Program	\$ -	\$ -	\$ 20,955	\$ 57,387	\$ 30,481	\$ 35,000	\$ -	\$ 35,000	87.1%	\$ -	\$ 35,000						
45-8081 Emergency Operating Funds			\$ -	\$ 536	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -						
47-7290 CARES UEN WIFI	\$ -	\$ -	\$ 29,285	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -						
48-7801 Federal Title I A	\$ -	\$ 45,131	\$ 75,479	\$ 93,232	\$ 10,000	\$ 32,784	\$ 8,269	\$ 41,053	24.4%	\$ 6,002	\$ 47,055						
48-7860 Federal NCLB Title II A	\$ 94	\$ 1,500	\$ 13,603	\$ 14,409	\$ -	\$ 13,603	\$ (13,603)	\$ -	0.0%	\$ 8,148	\$ 8,148						
<b>Total 4000:</b>	<b>\$ 206,453</b>	<b>\$ 216,862</b>	<b>\$ 856,624</b>	<b>\$ 1,417,820</b>	<b>\$ 278,913</b>	<b>\$ 463,667</b>	<b>\$ 41,319</b>	<b>\$ 504,986</b>	<b>55.2%</b>	<b>\$ (78,081)</b>	<b>\$ 426,905</b>						
<b>Total Revenue:</b>	<b>\$ 7,311,005</b>	<b>\$ 7,785,708</b>	<b>\$ 9,458,533</b>	<b>\$ 9,825,072</b>	<b>\$ 9,084,303</b>	<b>\$ 9,308,395</b>	<b>\$ 815,283</b>	<b>\$ 10,123,678</b>	<b>0.0%</b>	<b>\$ 275,010</b>	<b>\$ 10,398,688</b>						



	(1021 Students)	(998 Students)	(1011 Students)	(1013 Students)	Current Yr	(1010 Students)	1005	(2 Students)	1000		
	FY19 Actuals	FY20 Actuals	FY21 Actuals	FY22 Actuals	Current Yr	Approved Budget	Changes	Forecast	% of Forecast	Changes	FY24 Proposed Budget
<b>Expenses</b>											
<b>100 Salaries</b>											
121 Administration	\$ 177,699	\$ 224,807	\$ 330,247	\$ 348,257	\$ 356,367	\$ 390,906	\$ 8,000	\$398,906	89.3%	\$ 106,010	\$504,916
131 Teachers	\$ 2,204,956	\$ 2,285,395	\$ 2,410,978	\$ 2,464,001	\$ 2,498,655	\$ 2,653,940	\$ 97,715	\$2,751,656	90.8%	\$ 211,180	\$2,962,835
131 Special Education Salaries	\$ -	\$ 145,137	\$ 169,607	\$ 209,402	\$ 205,576	\$ 223,304	\$ 91,159	\$314,463	65.4%	\$ (14,255)	\$309,208
132 Substitute Teachers (PTO Stipend)	\$ 48,468	\$ 44,479	\$ 29,845	\$ 8,326	\$ -	\$ 30,000	\$ -	\$ 30,000	0.0%	\$ -	\$ 30,000
132 SpEd Substitutes	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,000	\$ -	\$ 5,000	0.0%	\$ -	\$ 5,000
131 Stipends / Merit Pay	\$ 139,808	\$ 66,063	\$ 293,212	\$ 80,397	\$ 53,715	\$ 52,020	\$ 6,980	\$ 59,000	91.0%	\$ 29,020	\$ 88,020
Summer Professional Development	\$ -	\$ -	\$ -	\$ -	\$ 12,000	\$ -	\$ 60,000	\$ 60,000	20.0%	\$ -	\$ 60,000
LETRS Training Stipend	\$ -	\$ -	\$ -	\$ -	\$ 72,500	\$ 65,000	\$ 7,500	\$ 72,500	100.0%	\$ -	\$ 72,500
LAND TRUST - Stipends	\$ -	\$ 6,000	\$ 11,950	\$ 1,125	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -
Special Education Stipends (After School)	\$ -	\$ -	\$ 27,333	\$ 43,904	\$ 2,500	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -
ESSER II - Stipends	\$ -	\$ -	\$ -	\$ 3,000	\$ 11,125	\$ 12,000	\$ -	\$ 12,000	92.7%	\$ (12,000)	\$ -
ESSER III - After School Stipends	\$ -	\$ -	\$ -	\$ 58,250	\$ 58,500	\$ 54,000	\$ -	\$ 54,000	108.3%	\$ (54,000)	\$ -
142 Counselor	\$ 21,659	\$ 49,348	\$ 87,983	\$ 151,048	\$ 159,809	\$ 171,182	\$ 6,000	\$177,182	90.2%	\$ 58,319	\$235,501
143 School Nurse	\$ 2,394	\$ 2,110	\$ 2,439	\$ 2,717	\$ 3,927	\$ 9,075	\$ (4,075.24)	\$5,000	78.5%	\$ 4,584	\$9,584
145 Librarian / Literacy Aide	\$ 18,707	\$ 16,856	\$ 11,008	\$ 12,483	\$ 15,068	\$ 23,835	\$ (8,334.52)	\$15,500	97.2%	\$ 5,296	\$20,796
152 Secretaries	\$ 115,770	\$ 92,778	\$ 79,252	\$ 110,496	\$ 115,362	\$ 121,982	\$ -	\$121,982	94.6%	\$ 11,083	\$133,065
161 Teacher Aides, Reading Specialists & Subs	\$ 173,729	\$ 215,301	\$ 264,113	\$ 287,163	\$ 386,344	\$ 419,165	\$ -	\$419,165	92.2%	\$ 21,450	\$440,616
161 LAND TRUST - K Aide/Student Support Para	\$ -	\$ 8,926	\$ 19,653	\$ 30,935	\$ 34,000	\$ 34,000	\$ -	\$ 34,000	100.0%	\$ -	\$ 34,000
161 SpEd Aides & Speech Therapist	\$ 114,326	\$ 107,379	\$ 116,434	\$ 127,717	\$ 136,091	\$ 159,398	\$ -	\$159,398	85.4%	\$ 11,985	\$171,383
162 Computer Aides	\$ 25,234	\$ 29,287	\$ 29,843	\$ 36,595	\$ 19,526	\$ 21,005	\$ -	\$21,005	93.0%	\$ 1,942	\$22,947
182 Custodial & Maintenance	\$ 77,252	\$ 95,290	\$ 109,798	\$ 110,269	\$ 80,476	\$ 107,917	\$ -	\$107,917	74.6%	\$ 3,847	\$111,764
191 Lunch Room Aide	\$ 193,879	\$ 182,237	\$ 189,317	\$ 231,425	\$ 226,047	\$ 299,916	\$ (49,916)	\$250,000	90.4%	\$ 102,229	\$352,229
<b>Total 100:</b>	<b>\$ 3,313,881</b>	<b>\$ 3,571,393</b>	<b>\$ 4,183,012</b>	<b>\$ 4,317,510</b>	<b>\$ 4,447,588</b>	<b>\$ 4,853,645</b>	<b>\$ 215,029</b>	<b>\$ 5,068,674</b>	<b>87.7%</b>	<b>\$ 486,690</b>	<b>\$5,555,364</b>
<b>200 Employee Benefits</b>											
220 Social Security	\$ 249,256	\$ 256,523	\$ 250,323	\$ 281,966	\$ 299,534	\$ 339,044	\$ 38,550	\$ 377,594	79.3%	\$ 27,580	\$ 405,174
LAND TRUST - BENEFITS	\$ -	\$ 1,142	\$ 2,418	\$ 4,574	\$ 2,601	\$ 2,601	\$ -	\$ 2,601	100.0%	\$ -	\$ 2,601
SpEd Social Security	\$ -	\$ -	\$ 21,351	\$ 23,687	\$ 20,869	\$ 29,659	\$ -	\$ 29,659	70.4%	\$ 6,800	\$ 36,459
230 Retirement	\$ 160,458	\$ 169,758	\$ 191,662	\$ 203,879	\$ 193,174	\$ 214,523	\$ -	\$ 214,523	90.0%	\$ 99,452	\$ 313,975
240 Group Insurance	\$ 525,659	\$ 531,517	\$ 598,606	\$ 668,982	\$ 591,967	\$ 656,000	\$ 15,000	\$ 671,000	88.2%	\$ 26,840	\$ 697,840
240 Deductible Stipend	\$ 4,647	\$ 12,251	\$ 11,524	\$ 15,868	\$ 26,368	\$ 15,000	\$ 13,000	\$ 28,000	94.2%	\$ (5,000)	\$ 23,000
270 Worker's Compensation Fund	\$ 12,840	\$ 12,185	\$ 13,181	\$ 15,225	\$ 18,867	\$ 16,425	\$ 2,442	\$ 18,867	100.0%	\$ 1,545	\$ 20,412
280 Unemployment Insurance	\$ 2,700	\$ 2,655	\$ 5,976	\$ 8,483	\$ 7,633	\$ 13,238	\$ (2,238)	\$ 11,000	69.4%	\$ 2,238	\$ 13,238
<b>Total 200:</b>	<b>\$ 955,560</b>	<b>\$ 986,031</b>	<b>\$ 1,095,041</b>	<b>\$ 1,222,664</b>	<b>\$ 1,161,013</b>	<b>\$ 1,286,490</b>	<b>\$ 66,754</b>	<b>\$ 1,353,244</b>	<b>85.8%</b>	<b>\$ 159,456</b>	<b>\$ 1,512,700</b>
<b>300 Purchased Professional &amp; Technical</b>											
320 Special Education Contractors	\$ 81,636	\$ 93,207	\$ 100,651	\$ 100,505	\$ 114,204	\$ 120,610	\$ -	\$ 120,610	94.7%	\$ 14,390	\$ 135,000
320 Counseling Services - (FY20 LCSW-Mental Health)	\$ 9,030	\$ 40,000	\$ 9,300	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -
330 Employee Training & Development	\$ 30,682	\$ 29,679	\$ 26,477	\$ 32,005	\$ -	\$ 30,000	\$ (21,000)	\$ 9,000	0.0%	\$ -	\$ 9,000
TSSA - Training & Development	\$ -	\$ -	\$ -	\$ -	\$ 30,000	\$ -	\$ 30,000	\$ 30,000	100.0%	\$ -	\$ 30,000
LAND TRUST - Training & Development	\$ -	\$ 6,372	\$ 2,578	\$ 9,134	\$ 1,232	\$ 24,000	\$ -	\$ 24,000	5.1%	\$ -	\$ 24,000
SpEd Training & Development	\$ -	\$ -	\$ 9,582	\$ 1,800	\$ 6,000	\$ -	\$ 6,000	\$ 6,000	100.0%	\$ -	\$ 6,000
LETRS Professional Learning Grant PD	\$ -	\$ -	\$ -	\$ -	\$ 48,637	\$ -	\$ -	\$ 48,637	100.0%	\$ (48,637)	\$ -
330 SEDC Services	\$ 3,433	\$ 3,341	\$ 3,891	\$ -	\$ 2,583	\$ 3,891	\$ -	\$ 3,891	66.4%	\$ -	\$ 3,891
340 Audit	\$ 9,857	\$ 255	\$ 11,350	\$ 22,070	\$ 22,134	\$ 22,070	\$ 64	\$ 22,134	100.0%	\$ (8,000)	\$ 14,134
345 Business Manager Services	\$ 76,800	\$ 76,800	\$ 76,800	\$ 71,808	\$ 71,808	\$ 78,336	\$ -	\$ 78,336	91.7%	\$ 1,572	\$ 79,908
349 Legal Services	\$ 1,005	\$ 10,755	\$ 670	\$ 1,638	\$ 4,113	\$ 15,000	\$ -	\$ 15,000	27.4%	\$ (7,000)	\$ 8,000
350 Technical Services (IT)	\$ 64,325	\$ 64,389	\$ 64,212	\$ 98,144	\$ 88,356	\$ 101,760	\$ -	\$ 101,760	86.8%	\$ 240	\$ 102,000
580 Admin & Teacher Travel (Meals)	\$ 25,512	\$ 14,181	\$ 5,762	\$ 29,004	\$ 11,358	\$ 20,280	\$ (10,280)	\$ 10,000	113.6%	\$ (3,000)	\$ 7,000
TSSA - Travel	\$ -	\$ -	\$ -	\$ 20,280	\$ -	\$ -	\$ 20,280	\$ 20,280	100.0%	\$ -	\$ 20,280
LAND TRUST - Travel	\$ -	\$ 5,422	\$ 1,923	\$ 6,538	\$ 6,000	\$ 6,000	\$ -	\$ 6,000	100.0%	\$ -	\$ 6,000
SpEd - Travel	\$ -	\$ -	\$ -	\$ 5,075	\$ 5,075	\$ 2,220	\$ 2,855	\$ 5,075	100.0%	\$ (1,378)	\$ 3,697
<b>Total 300:</b>	<b>\$ 302,280</b>	<b>\$ 338,979</b>	<b>\$ 313,196</b>	<b>\$ 380,259</b>	<b>\$ 431,780</b>	<b>\$ 424,167</b>	<b>\$ 27,919</b>	<b>\$ 500,723</b>	<b>86.2%</b>	<b>\$ (51,813)</b>	<b>\$ 448,910</b>
<b>400 Purchased Property Services</b>											
411 Water/Sewage	\$ 10,531	\$ 11,480	\$ 10,936	\$ 10,597	\$ 8,867	\$ 12,000	\$ -	\$ 12,000	73.9%	\$ -	\$ 12,000
412 Disposal Services	\$ 2,896	\$ 5,487	\$ 8,000	\$ 11,222	\$ 14,246	\$ 13,000	\$ 2,480	\$ 15,480	92.0%	\$ -	\$ 15,480
420 Cleaning Services	\$ 1,937	\$ 3,095	\$ 2,838	\$ 2,684	\$ 5,313	\$ 4,000	\$ 1,800	\$ 5,800	91.6%	\$ -	\$ 5,800
431 Lawn Care Services	\$ 18,761	\$ 15,835	\$ 11,925	\$ 10,700	\$ 10,950	\$ 12,000	\$ -	\$ 12,000	91.3%	\$ -	\$ 12,000
431 Non-Technology Repairs & Maintenance	\$ 11,695	\$ 12,300	\$ 17,931	\$ 31,073	\$ 29,104	\$ 30,000	\$ 3,000	\$ 33,000	88.2%	\$ -	\$ 33,000
432 Copy Machine Servicing	\$ 10,038	\$ 7,442	\$ 9,636	\$ 9,145	\$ 5,629	\$ 13,000	\$ (5,000)	\$ 8,000	70.4%	\$ 5,000	\$ 13,000
<b>Total 400:</b>	<b>\$ 55,858</b>	<b>\$ 55,639</b>	<b>\$ 61,266</b>	<b>\$ 75,421</b>	<b>\$ 74,109</b>	<b>\$ 84,000</b>	<b>\$ 33,054</b>	<b>\$ 86,280</b>	<b>85.9%</b>	<b>\$ 5,000</b>	<b>\$ 91,280</b>
<b>500 Other Purchased Services</b>											
522 Property & Liability Insurance	\$ 18,828	\$ 27,924	\$ 34,834	\$ 42,668	\$ 40,388	\$ 45,300	\$ -	\$ 45,300	89.2%	\$ 3,624	\$ 48,924
530 Telephone	\$ 8,282	\$ 9,060	\$ 9,841	\$ 10,127	\$ 1,081	\$ 11,000	\$ -	\$ 11,000	9.8%	\$ -	\$ 11,000
540 Marketing	\$ 3,510	\$ 5,928	\$ 6,095	\$ 9,042	\$ 7,923	\$ 9,000	\$ -	\$ 9,000	88.0%	\$ -	\$ 9,000
590 Field Trips / Bus Rental	\$ 1,294	\$ -	\$ -	\$ 100	\$ 170	\$ 3,000	\$ -	\$ 3,000	5.7%	\$ -	\$ 3,000
<b>Total 500:</b>	<b>\$ 31,914</b>	<b>\$ 42,912</b>	<b>\$ 50,770</b>	<b>\$ 61,937</b>	<b>\$ 49,562</b>	<b>\$ 68,300</b>	<b>\$ -</b>	<b>\$ 68,300</b>	<b>72.6%</b>	<b>\$ 3,624</b>	<b>\$ 71,924</b>





	(1021 Students)	(998 Students)	(1011 Students)	(1013 Students)	Current Yr	(1010 Students)	1005	(2 Students)	1000		
	FY19 Actuals	FY20 Actuals	FY21 Actuals	FY22 Actuals	Actuals	Approved Budget	Changes	Forecast	% of Forecast	Changes	FY24 Proposed Budget
<b>600 Supplies and Materials</b>											
610a Classroom Supplies	\$ 49,207	\$ 50,164	\$ 48,468	\$ 50,898	\$ 16,248	\$ 63,000	\$ (43,000)	\$ 20,000	81.2%	\$ 24,680	\$ 44,680
TSSA - Supplies				\$ -	\$ 3,167	\$ -	\$ 18,320	\$ 18,320	17.3%	\$ -	\$ 18,320
LAND TRUST		\$ 2,197	\$ 3,976	\$ 3,227	\$ 11,967	\$ 12,000	\$ -	\$ 12,000	99.7%	\$ -	\$ 12,000
ESSER II - Supplies		\$ -	\$ -	\$ -	\$ 17,171	\$ 17,000	\$ -	\$ 17,000	101.0%	\$ (17,000)	\$ -
610b Special Ed Supplies	\$ 2,357	\$ 3,377	\$ 30,051	\$ 7,321	\$ 5,203	\$ 10,000	\$ -	\$ 10,000	52.0%	\$ -	\$ 10,000
610 Elective Supplies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	\$ 6,000	\$ 6,000
610c Theatre Supplies	\$ -	\$ -	\$ -	\$ 3,334	\$ 6,886	\$ 4,000	\$ 3,000	\$ 7,000	98.4%	\$ -	\$ 7,000
610d CCA Expenses	\$ 1,364	\$ 2,251	\$ 3,486	\$ 7,159	\$ 4,843	\$ 5,179	\$ -	\$ 5,179	93.5%	\$ -	\$ 5,179
610e Student Activity Supplies / Incentives	\$ 4,624	\$ 11,444	\$ 12,956	\$ 9,655	\$ 13,613	\$ 18,000	\$ (2,000)	\$ 16,000	85.1%	\$ (2,000)	\$ 14,000
610f Board Expenses/meals	\$ 2,918	\$ 2,109	\$ 6,091	\$ 3,393	\$ 3,616	\$ 7,000	\$ -	\$ 7,000	51.7%	\$ -	\$ 7,000
610g Office Supplies/General	\$ 9,333	\$ 9,609	\$ 27,813	\$ 24,713	\$ 27,127	\$ 28,000	\$ -	\$ 28,000	96.9%	\$ -	\$ 28,000
610h Safety Supplies	\$ 2,758	\$ 2,109	\$ 1,742	\$ 2,322	\$ 3,620	\$ 3,000	\$ 1,000	\$ 4,000	90.5%	\$ -	\$ 4,000
610i GWA Gives Back	\$ 2,265	\$ 165	\$ 165	\$ 5,096	\$ 1,295	\$ -	\$ 1,295	\$ 1,295	100.0%	\$ 5	\$ 1,300
610j First Aid Supplies	\$ 308	\$ 877	\$ 1,259	\$ 398	\$ 862	\$ 1,000	\$ -	\$ 1,000	86.2%	\$ -	\$ 1,000
610k Director Discretionary Fund	\$ 6,276	\$ 6,361	\$ 8,000	\$ 9,693	\$ 9,781	\$ 10,000	\$ -	\$ 10,000	97.8%	\$ -	\$ 10,000
610m Staff Lounge	\$ 3,174	\$ 4,564	\$ 4,612	\$ 5,570	\$ 5,772	\$ 5,500	\$ 272	\$ 5,772	100.0%	\$ 228	\$ 6,000
610n Swag Store	\$ -	\$ -	\$ -	\$ 4,821	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -
610o Christmas Party	\$ -	\$ -	\$ -	\$ 4,018	\$ 3,780	\$ -	\$ -	\$ 4,018	94.1%	\$ -	\$ 4,018
610p Health and Wellness	\$ -	\$ -	\$ -	\$ 1,793	\$ 2,196	\$ 4,000	\$ -	\$ 4,000	54.9%	\$ (1,000)	\$ 3,000
621 Natural Gas	\$ 7,048	\$ 7,195	\$ 7,969	\$ 10,144	\$ 13,652	\$ 12,500	\$ 1,500	\$ 14,000	97.5%	\$ -	\$ 14,000
622 Electricity	\$ 40,980	\$ 31,382	\$ 37,889	\$ 40,467	\$ 38,935	\$ 40,000	\$ 3,000	\$ 43,000	90.5%	\$ -	\$ 43,000
630 School Lunch Prgm	\$ 144,666	\$ 147,100	\$ 163,767	\$ 208,598	\$ 218,576	\$ 200,000	\$ 30,000	\$ 230,000	95.0%	\$ -	\$ 230,000
641 Textbooks/Curriculum	\$ 78,533	\$ 195,846	\$ 213,598	\$ 26,138	\$ 36,474	\$ 76,081	\$ (20,200)	\$ 55,881	65.3%	\$ 919	\$ 56,800
TSSA - Curriculum				\$ -	\$ 39,200	\$ -	\$ 39,200	\$ 39,200	100.0%	\$ -	\$ 39,200
UCCRSC	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -
Digital Teaching & Learning Curriculum				\$ 51,395	\$ 45,836	\$ 43,919	\$ 1,917	\$ 45,836	100.0%	\$ (31,836)	\$ 14,000
SpEd - Textbooks/Curriculum	\$ -	\$ 5,752	\$ 5,752	\$ -	\$ 29,855	\$ -	\$ 29,855	\$ 29,855	100.0%	\$ -	\$ 29,855
644 Library Books	\$ 5,120	\$ 2,624	\$ 3,726	\$ 9,654	\$ 5,318	\$ 7,000	\$ -	\$ 7,000	76.0%	\$ (3,000)	\$ 4,000
670 Educational Software	\$ 35,672	\$ 10,659	\$ 10,659	\$ 21,357	\$ 6,236	\$ 26,500	\$ (10,800)	\$ 15,700	39.7%	\$ -	\$ 15,700
TSSA - Educational Software				\$ -	\$ 10,800	\$ -	\$ 10,800	\$ 10,800	100.0%	\$ -	\$ 10,800
LAND TRUST - Educational Software		\$ 16,388	\$ 16,388	\$ 14,501	\$ 14,700	\$ 14,700	\$ -	\$ 14,700	100.0%	\$ -	\$ 14,700
SpEd - Educational Software	\$ -	\$ 5,752	\$ 5,752	\$ 1,343	\$ 690	\$ 3,400	\$ -	\$ 3,400	20.3%	\$ -	\$ 3,400
ESSER III - Educational Software				\$ 29,360	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -
680 Maintenance Supplies & Material	\$ 35,448	\$ 36,323	\$ 40,909	\$ 29,619	\$ 37,260	\$ 40,000	\$ 2,244	\$ 42,244	88.2%	\$ (2,244)	\$ 40,000
ESSER III - Maintenance Supplies	\$ 35,448	\$ 36,323	\$ -	\$ 5,123	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -
<b>Total 600:</b>	<b>\$ 467,499</b>	<b>\$ 590,571</b>	<b>\$ 655,028</b>	<b>\$ 591,110</b>	<b>\$ 634,679</b>	<b>\$ 655,797</b>	<b>\$ 66,403</b>	<b>\$ 722,200</b>	<b>87.9%</b>	<b>\$ (25,248)</b>	<b>\$ 696,952</b>
<b>700 Property</b>											
710 Land and Site Improvements & Building	\$ 28,888	\$ 27,384	\$ 25,438	\$ 30,499	\$ 24,089	\$ 25,000	\$ 82,000	\$ 107,000	22.5%	\$ (82,000)	\$ 25,000
733 Furniture and Fixtures	\$ 23,301	\$ 17,848	\$ 8,086	\$ 15,649	\$ 19,702	\$ 20,000	\$ -	\$ 20,000	98.5%	\$ -	\$ 20,000
SpEd - Furniture and Fixtures	\$ -	\$ -	\$ 4,204	\$ -	\$ 1,296	\$ -	\$ 1,296	\$ 1,296	100.0%	\$ -	\$ 1,296
734 Technology Hardware	\$ 72,346	\$ 36,138	\$ 52,839	\$ 19,393	\$ 1,347	\$ 2,700	\$ -	\$ 2,700	49.9%	\$ -	\$ 2,700
LAND TRUST - Hardware		\$ 39,649	\$ 33,063	\$ 50,403	\$ 49,510	\$ 55,000	\$ -	\$ 55,000	90.0%	\$ -	\$ 55,000
SpEd - Tech Hardware	\$ -	\$ -	\$ 52,071	\$ 4,485	\$ 345	\$ -	\$ 345	\$ 345	100.0%	\$ -	\$ 345
ESSER III - Tech Hardware				\$ 332,124	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -
Digital Teaching & Learning Hardware				\$ -	\$ 15,000	\$ 15,000	\$ -	\$ 15,000	100.0%	\$ -	\$ 15,000
736 Technology Software	\$ 31,756	\$ 38,126	\$ 34,334	\$ 46,451	\$ 599	\$ 48,000	\$ (48,000)	\$ -	0.0%	\$ -	\$ -
TSSA - Software				\$ -	\$ 48,000	\$ -	\$ 48,000	\$ 48,000	100.0%	\$ -	\$ 48,000
LAND TRUST - Software		\$ 1,274	\$ 995	\$ 7,712	\$ 5,500	\$ 5,500	\$ -	\$ 5,500	100.0%	\$ -	\$ 5,500
SpEd - Software	\$ -	\$ 5,752	\$ -	\$ 1,600	\$ 1,680	\$ 1,600	\$ 80	\$ 1,680	100.0%	\$ 120	\$ 1,800
739 Kitchen Equipment	\$ 1,983	\$ 3,666	\$ 6,614	\$ 4,168	\$ 23,440	\$ 20,000	\$ 3,440	\$ 23,440	100.0%	\$ -	\$ 23,440
790 Cap Ex Fund	\$ 14,762	\$ 119,433	\$ 185,581	\$ 127,067	\$ 177,616	\$ 150,000	\$ 163,003	\$ 313,003	56.7%	\$ (78,003)	\$ 235,000
<b>Total 700:</b>	<b>\$ 173,036</b>	<b>\$ 289,270</b>	<b>\$ 403,225</b>	<b>\$ 639,551</b>	<b>\$ 368,124</b>	<b>\$ 342,800</b>	<b>\$ 250,164</b>	<b>\$ 592,964</b>	<b>62.1%</b>	<b>\$ (159,883)</b>	<b>\$ 433,081</b>
<b>800 Debt Service &amp; Miscellaneous</b>											
810 Dues and Fees	\$ 12,172	\$ 11,591	\$ 13,619	\$ 11,165	\$ 13,191	\$ 15,000	\$ -	\$ 15,000	87.9%	\$ -	\$ 15,000
830 Bond Restricted Assets (Interest)	\$ 591,363	\$ 690,709	\$ 559,913	\$ 530,913	\$ 410,909	\$ 500,913	\$ -	\$ 500,913	82.0%	\$ (31,400)	\$ 469,513
840 Bond Restricted Assets (Principal)	\$ 676,845	\$ 521,193	\$ 725,000	\$ 750,000	\$ 711,396	\$ 785,000	\$ -	\$ 785,000	90.6%	\$ 30,000	\$ 815,000
833 Bond Fees	\$ 41,170	\$ 33,800	\$ 6,000	\$ 57,240	\$ 7,300	\$ 33,800	\$ -	\$ 33,800	21.6%	\$ -	\$ 33,800
890 Miscellaneous	\$ -	\$ -	\$ -	\$ 3,486	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -
<b>Total 800:</b>	<b>\$ 1,321,550</b>	<b>\$ 1,257,293</b>	<b>\$ 1,304,532</b>	<b>\$ 1,352,804</b>	<b>\$ 1,142,796</b>	<b>\$ 1,334,713</b>	<b>\$ -</b>	<b>\$ 1,334,713</b>	<b>85.6%</b>	<b>\$ (1,400)</b>	<b>\$ 1,333,313</b>
<b>Total Expenses:</b>	<b>\$ 6,621,578</b>	<b>\$ 7,132,088</b>	<b>\$ 8,066,070</b>	<b>\$ 8,641,256</b>	<b>\$ 8,309,651</b>	<b>\$ 9,049,911</b>	<b>\$ 659,323</b>	<b>\$ 9,727,097</b>	<b>85.4%</b>	<b>\$ 416,427</b>	<b>\$ 10,143,524</b>
<b>Net Income:</b>	<b>\$ 689,427</b>	<b>\$ 653,620</b>	<b>\$ 1,392,463</b>	<b>\$ 1,183,816</b>	<b>\$ 774,652</b>	<b>\$ 258,484</b>	<b>\$ 155,960</b>	<b>\$ 396,581</b>	<b>195.3%</b>	<b>\$ (141,416)</b>	<b>\$ 255,164</b>
								<b>\$ 250,000</b>	End Forecasted Spend		<b>\$ 250,000</b>
								<b>\$ 361,805</b>	End Service: (\$56,733)		<b>\$ 255,164</b>
								<b>\$ 34,776</b>	SpEd: (\$65,000)		<b>\$ (83,614)</b>
									SpEd: (\$8,920)		<b>\$ (92,534)</b>
Cap Ex Fund:	\$ (35,581)				At year end:	\$ 168,402	Use: \$177,616	At year end:	\$ 303,789	\$ 538,789	At year end:
(Unrestricted over \$350,000) Special Project Fund:					Beg of year:	\$ 97,843		At year end:	\$ 109,648	\$ 109,647.52	At year end:
<b>Fund Reserve:</b>	<b>\$ 4,063,511</b>	<b>\$ 4,063,511</b>	<b>\$ 5,841,739</b>	<b>\$ 5,841,739</b>		<b>\$ 6,100,223</b>		<b>\$ 6,203,544</b>			<b>\$ 6,458,708</b>



## PROPOSAL FOR BOARD ACTION

**Proposal Title:** \_\_\_\_\_

**Submitted by:** \_\_\_\_\_

**Sponsoring Committee:** \_\_\_\_\_

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

**Situation:**

**Background:**

**Assessment:**

**Recommendation:**

Please submit this form with all accompanying paperwork to the Board Secretary, Jaycee Rogers, at [jrogers@gwacademy.org](mailto:jrogers@gwacademy.org) by the 15<sup>th</sup> day of the month of the Board meeting.

# **GEORGE WASHINGTON ACADEMY**

## **SPECIAL EDUCATION POLICIES AND PROCEDURES MANUAL**

COMBINATION SLD ELIGIBILITY METHOD

MAY 2023

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## I. GENERAL PROVISIONS

### I.A. PURPOSES (34 CFR § 300.1; RULES I.A.)

1. The primary purposes of this George Washington Academy’s policies and procedures manual, consistent with Utah Code Annotated (UCA) Title 53E, Chapter 7, Part 2, Special Education Program; and the Individuals with Disabilities Education Improvement Act (IDEA), as amended; are:
  - a. To ensure that all students with disabilities ages 3 through 21 in Utah, including students with disabilities who have been suspended or expelled from school and students who have not graduated from high school with a regular high school diploma, have available to them a free appropriate public education
  - b. (FAPE) that emphasizes special education and related services, as specified on an Individualized Education Program (IEP) designed to meet their unique needs and prepare them for further education, employment, and independent living;
  - c. To ensure that the rights of students with disabilities and their parent(s) are protected;
  - d. To ensure that State standards are established for the provision of a FAPE to students with disabilities, as defined in the Rules;
  - e. To assess and ensure the effectiveness of efforts to educate students with disabilities.

### I.B. DEFINITIONS AS USED IN THESE RULES (34 CFR §§ 300.4–300.45; RULES I.E.)

1. George Washington Academy has adopted all applicable definitions as found in Rule I.E. 1-59.

### I.C. FULL EDUCATIONAL OPPORTUNITY GOAL (34 CFR § 300.109; RULES IX.A.2.D.(2)(C))

1. George Washington Academy provides a free appropriate public education (FAPE) to all eligible students with disabilities in conformity with the requirements of the Rules and the IDEA. George Washington Academy hereby affirms the goal of providing a full educational opportunity to all students with disabilities determined eligible for special education and related services, of the ages served by George Washington Academy, in accordance with all of the timeline requirements of the IDEA. George Washington Academy follows all necessary requirements in the development and delivery of an individualized education program (IEP) for eligible students. Placement in the least restrictive environment (LRE) will be implemented to the maximum extent appropriate for students with special needs. George Washington Academy provides a continuum of placements to address the needs of students with disabilities to ensure those students receive special education and related services appropriate to their needs.

**I.D. METHODS OF ENSURING SERVICES (34 CFR § 300.154; RULES IX.A.2.D.(2)(M))**

1. George Washington Academy ensures each eligible student with disabilities enrolled in the school receives the services included in the IEP through a systematic process of IEP internal file reviews and monitoring of service delivery by George Washington Academy personnel.

## II. IDENTIFICATION, LOCATION, AND EVALUATION

### II.A. CHILD FIND SYSTEM (34 CFR §§ 300.109, 300.111; RULES II.A.)

1. George Washington Academy, in accordance with the requirements of Part B of the IDEA and with the Rules, has developed policies and procedures to ensure that all students with disabilities residing within the jurisdiction of the LEA, including students with disabilities birth through 21 years of age and, regardless of the severity of their disability, and who are in need of special education and related services, are identified, located, and evaluated. These policies and procedures include a practical method for determining which students are currently receiving needed special education and related services and provide a process to reevaluate those who are found eligible within the three-year timeframe.
2. The requirements of this section apply to:
  - a. Highly mobile students with disabilities (such as students who are migrant and experiencing homelessness) (34 CFR § 300.111(c)(2)).
  - b. Students who have been suspended or expelled from school (34 CFR § 300.101(a)).
  - c. Students who have not graduated from high school with a regular high school diploma (34 CFR § 300.102(a)(3)(iii)).
  - d. Students who are suspected of being a student with a disability under the Rules and who are in need of special education and related services, even though they are advancing from grade to grade (34 CFR § 300.111(c)(1)).
  - e. Students who are homeschooled and students enrolled in private schools within the school district's boundaries.
  - f. Students in State custody/care.
  - g. Students in nursing homes.
3. Public charter schools are responsible for child find for students enrolled in their own school and have no responsibility for child find for students in private schools. Charter schools may not refer enrolled students to the local school district for child find.
4. The determination that a student is a “student with a disability” under the Rules must be made on an individual basis, by a group made up of the parent or student who is an adult and school personnel determined by the student’s LEA.
5. Major components of the child find system include:
  - a. LEA implementation, coordination, and tracking of child find activities and students identified, (34 CFR § 300.131).
  - b. USBE staff provision of ongoing technical assistance to LEAs, private schools, and other State agencies in implementing the child find system.

- c. Implementation of the statewide data collection system for reporting student information, including Federal student count (34 CFR §§ 300.132, 300.640– 641) and the data requirements found in the Rules VI.B.3., which includes that:
  - (1) Each school district must maintain in its records, and provide to the USBE staff annually, the following information related to parentally placed or student who is an adult nonprofit private school students:
    - (a) The number of students evaluated and reevaluated within three years;
    - (b) The number of students determined to be students with disabilities; and
    - (c) The number of students served.
6. The collection and use of data to meet the requirements of this section are subject to the confidentiality of information provisions under the Rules and R277-487.

**II.B. REFERRAL (34 CFR § 300.301; RULES II.B.)**

1. Consistent with the consent requirements in Rules II.C., either a parent or the student who is an adult or an LEA may initiate a request for an initial evaluation to determine if a student is a student with a disability under Part B of the IDEA and the Rules. Upon receipt of a request for an evaluation, George Washington Academy must respond within a reasonable timeframe. The response may not be delayed due to George Washington Academy's Response to Intervention process.
2. George Washington Academy shall provide an initial special education assessment for children who enter the custody of the Division of Child and Family Services (DCFS), upon request by that division and the LEA obtains appropriate parental consent for the evaluation for children whose school records indicate that they may have disabilities requiring special education services.

**II.C. PARENTAL CONSENT (34 CFR § 300.300; RULES II.C.)**

1. Parental consent for initial evaluation.
  - a. The LEA proposing to conduct an initial evaluation to determine if a student qualifies as a student with a disability under the Rules must, after providing prior written notice to the parent or student who is an adult, obtain informed consent, consistent with Rules I.E.9, from the parent of the student or the student who is an adult before conducting the evaluation.
    - (1) Consent from a parent or student who is an adult for initial evaluation must not be construed as consent for initial provision of special education and related services.

- (2) George Washington Academy must make reasonable efforts to obtain informed consent from the parent or student who is an adult for an initial evaluation to determine whether the student is a student with a disability.
  - (3) When conducting psychological evaluations, George Washington Academy must implement the parental or student who is an adult consent requirements of UCA 53E-9-203 (Student Privacy and Data Protection).
- b. For initial evaluations only, if the student is a ward of the State and is not residing with the student's parent(s), George Washington Academy is not required to obtain informed consent from the parent for an initial evaluation to determine whether the student is a student with a disability if:
- (1) Despite reasonable efforts to do so, George Washington Academy cannot discover the whereabouts of the parent(s) of the student;
  - (2) The rights of the parent(s) of the student have been terminated in accordance with State law; or
  - (3) The rights of the parent(s) to make educational decisions have been subrogated by a judge in accordance with State law and consent for an initial evaluation has been given by an individual appointed by the judge to represent the student.
- c. If the parent(s) of a student or a student who is an adult enrolled in public school or seeking to be enrolled in public school does not provide consent for initial evaluation, or fails to respond to a request to provide consent, George Washington Academy may, but is not required to, pursue the initial evaluation of the student by utilizing the procedural safeguards or the due process procedures in Section IV of the Rules.
- (1) George Washington Academy does not violate its obligation under the child find provisions of the Rules if it declines to pursue the evaluation by utilizing the procedural safeguards or the due process procedures.
2. Parental consent for services.
- a. George Washington Academy that is responsible for making a FAPE available to a student with a disability must obtain informed consent from the parent(s) of the student or student who is an adult before the initial provision of special education and related services to the student.
  - b. George Washington Academy must make reasonable efforts to obtain informed consent from the parent(s) or student who is an adult for the initial provision of special education and related services to the eligible student with disabilities.
  - c. If the parent(s) of a student or student who is an adult fails to respond to a request for, or refuses to consent to, the initial provision of special education and related services, George Washington Academy:

- (1) May not use the procedures in of the Rules IV., including the mediation procedures or the due process procedures, in order to obtain agreement or a ruling that the services may be provided to the student;
  - (2) Will not be considered to be in violation of the requirement to make available a FAPE to the student for the failure to provide the student with the special education and related services for which George Washington Academy requests consent; and
  - (3) Is not required to convene an IEP Team meeting or develop an IEP for the student for the special education and related services for which George Washington Academy requests such consent.
- d. If, at any time subsequent to the initial provision of special education and related services, the parent(s) of a student or student who is an adult revokes consent in writing for the continued provision of special education and related services, George Washington Academy:
- (1) May not continue to provide special education and related services to the student but must provide prior written notice in accordance with Rules IV.D. before ceasing the provision of special education and related services;
  - (2) May not use the procedures in Rules IV., including the mediation procedures or the due process procedures, in order to obtain agreement or a ruling that the services may be provided to the student;
  - (3) Will not be considered to be in violation of the requirement to make available a FAPE to the student for the failure to provide the student with the special education and related services for which George Washington Academy requests consent; and
  - (4) Is not required to convene an IEP Team meeting or develop an IEP for the student for the special education and related services for which George Washington Academy requests such consent (34 CFR § 300.300).
3. Parental consent for reevaluations.
- a. George Washington Academy must obtain informed parental or student who is an adult consent prior to conducting any reevaluation of a student with a disability.
  - b. If the parent or student who is an adult refuse to consent to the reevaluation, George Washington Academy may, but is not required to, pursue the reevaluation by using the dispute resolution procedures provided in the procedural safeguards, and including mediation or due process procedures.
  - c. George Washington Academy does not violate its obligation under child find if it declines to pursue the reevaluation.

- d. The informed parental or student who is an adult consent need not be obtained if the LEA can demonstrate that:
    - (1) It made reasonable efforts to obtain such consent; and
  - e. The student's parent or the student who is an adult has failed to respond.
4. Other consent requirements.
- a. Parental or student who is an adult consent is not required before:
    - (1) Reviewing existing data as part of an evaluation or a reevaluation; or
    - (2) Administering a test or other evaluation that is administered to all students unless consent is required for all students before administration of that test or evaluation.
  - b. George Washington Academy may not use a parent's or student who is an adult refusal to consent to one service or activity under Rules II.C.1., II.C.2., or II.C.3., to deny the parent or student any other service, benefit, or activity of the LEA, except as required by this part.
  - c. To meet the reasonable efforts requirement in Rules II.C.1.a.2., II.C.1.b.1., II.C.2.b., and II.C.3.d.1., George Washington Academy must document its attempts to obtain parental or student who is an adult consent using the procedures in Rules III.G.3.
  - d. Unless parent(s) or the student who is an adult revoke consent for special education and related services or refuse consent for initial placement, disagreements regarding the provision of IEP services should be resolved by the IEP Team and result in a completed IEP which includes all components necessary for the provision of FAPE.

**II.D. INITIAL EVALUATION (34 CFR § 300.301; RULES II.D.)**

- 1. George Washington Academy must conduct a full and individual initial evaluation to determine whether a student is a “student with a disability” under Part B of the IDEA and the Rules, and to determine the educational needs of the student.
- 2. The initial evaluation:
  - a. Must be conducted within 45 school days of receiving parental or student who is an adult consent for the evaluation, unless:
    - (1) The initial evaluation is requested by the Division of Child and Family Services (DCFS) and George Washington Academy obtains appropriate consent for the evaluation, in which case George Washington Academy shall provide an initial special education evaluation to an individual who enters DCFS custody if DCFS suspects the individual may be an eligible student within 30 days after the day on which DCFS makes the request (UCA 53E-7-207).



- (a) George Washington Academy may refuse to conduct an evaluation described in the Rules II.a.(1). if George Washington Academy reviews the relevant data regarding the individual and, within ten days after the day on which George Washington Academy received the request described in the Rules II.a.(1)., gives the DCFS prior written notice of refusal to evaluate.
  - b. Must consist of procedures to determine:
    - (1) If the student is a student with a disability; and
    - (2) The educational needs of the student.
3. The timeframe shall not apply to George Washington Academy if:
- a. The parent of a student repeatedly fails or refuses to produce the student for the evaluation; or
  - b. The student who is an adult repeatedly fails or refuses to participate in evaluation activities; or
  - c. A student enrolls in George Washington Academy after the relevant timeframe has begun, and prior to a determination by the student's previous LEA as to whether the student is a student with a disability.
  - d. The exception in Rules II.D.3.c. applies only if George Washington Academy is making sufficient progress to ensure a prompt completion of the evaluation, and the parent or student who is an adult and George Washington Academy agree to a specific time when the evaluation will be completed.

#### **II.E. SCREENING FOR INSTRUCTIONAL PURPOSES (34 CFR § 300.302; RULES II.E.)**

- 1. The screening of a student by a teacher or specialist to determine appropriate instructional strategies for curriculum implementation shall not be considered to be an evaluation for eligibility for special education and related services. Results of screenings should be considered by George Washington Academy for child find purposes.

#### **II.F. EVALUATION PROCEDURES (34 CFR § 300.304; RULES II.F.)**

- 1. George Washington Academy has established and implemented procedures that meet the evaluation requirements of Part B of the IDEA and the Rules as follows:
  - a. In conducting the evaluation, George Washington Academy must:
    - (1) Use a variety of assessment tools and strategies to gather relevant functional, developmental, and academic information about the student, including information provided by a parent or student who is an adult, that may assist in determining:
      - (a) Whether the student is a student with a disability; and

- (b) The content of the student's IEP, including information related to enabling the student to be involved in and progress in the general education curriculum (or, for a student in preschool, to participate in appropriate activities);
- (2) Not use any single procedure as the sole criterion for determining whether a student is a student with a disability and for determining an appropriate educational program for the student; and
  - (3) Use technically sound instruments that may assess the relative contribution of cognitive and behavioral factors, in addition to physical or developmental factors  
George Washington Academy must consider the publication date and continued validity of assessments in use when new editions are published.
  - (4) George Washington Academy must ensure that assessments and other evaluation materials used to assess a student:
    - (a) Are selected and administered so as not to be discriminatory on a racial or cultural basis;
    - (b) Are provided and administered in the student's native language or other mode of communication, and in the form most likely to yield accurate information on what the student knows and can do academically, developmentally, and functionally, unless it is clearly not feasible to so provide or administer;
    - (c) Are selected to assess the specific areas of concern identified by the assessment/evaluation group, including the parent(s) or student who is an adult;
    - (d) Are used for the purposes for which the assessments or measures are valid and reliable;
    - (e) Are selected and administered by trained and knowledgeable personnel based upon the specific assessment's requirements; and
    - (f) Are administered and interpreted in accordance with any instructions and administrator requirements provided by the producer of the assessments and the Standards for Educational and Psychological Testing (AERA, APA, NCME, 2014).
      - (i) George Washington Academy must ensure and document that all evaluators meet the assessment publishers' administrator/interpreter/user requirements, (e.g., appropriate degree, higher education coursework in tests and measures, and supervised clinical experiences/practica).

- (ii) George Washington Academy shall provide documentation to USBE staff upon request.
- (5) George Washington Academy must ensure that:
- (a) Assessments and other evaluation materials include those tailored to assess specific areas of educational need and not merely those that are designed to provide a single general intelligence quotient.
  - (b) Assessments are selected and administered so as best to ensure that if an assessment is administered to a student with impaired sensory, manual, or speaking skills, the assessment results accurately reflect the student's aptitude or achievement level or whatever other factors the test purports to measure, rather than reflecting the student's impaired sensory, manual, or speaking skills (unless those skills are the factors that the test purports to measure).
  - (c) The administration of psychological testing and the evaluation or assessment of personal characteristics, such as intelligence (e.g., cognitive, IQ), personality, abilities, interests, aptitudes, and neuropsychological functioning are only administered and interpreted by personnel who have been trained and fully meet the administrator/ interpreter/user qualifications of the test publisher (e.g., appropriate degree, higher education coursework in tests and measures, and supervised clinical experiences/practica).
  - (d) The student is assessed in all areas related to the suspected disability, including, if appropriate, health, vision, hearing, social and emotional status, general intelligence, academic performance, communicative status, and motor abilities.
  - (e) Assessments of students with disabilities who transfer from another LEA to George Washington Academy in the same school year are coordinated with those students' prior and subsequent schools, as necessary and as expeditiously as possible, to ensure prompt completion of full evaluations.
  - (f) In evaluating each student with a disability, the evaluation is sufficiently comprehensive to identify all the student's special education and related services needs, whether or not commonly linked to the disability category in which the student has been classified.
  - (g) Assessment tools and strategies provide relevant information that directly assists persons in determining the educational needs of the student are provided.
- b. The USDB is available to LEAs for assessments of students with visual impairment and hearing loss, as well as professional learning on appropriate administration of

assessments, and procedures to ensure appropriate interpretation of assessments (R277-800-7).

**II.G. REEVALUATION PROCEDURES (34 CFR § 300.303; RULES II.G.)**

1. George Washington Academy must ensure that a reevaluation of each student with a disability is conducted:
  - a. If George Washington Academy determines that the educational or related services needs, including improved academic achievement and functional performance, of the student warrant a reevaluation; or
  - b. If the student's parents or student who is an adult or teacher requests a reevaluation.
2. A reevaluation:
  - a. May occur not more than once a year, unless the parents or student who is an adult and George Washington Academy agree otherwise; and
  - b. Must occur at least once every three years, unless the parents or adult student and George Washington Academy agree that a reevaluation is unnecessary as there are data available to continue eligibility and determine the educational needs of the student. When the parents or student who is an adult and LEA agree that a reevaluation is unnecessary, the group must document data reviewed and used in an evaluation report and complete an eligibility determination.

**II.H. ADDITIONAL REQUIREMENTS FOR INITIAL EVALUATIONS AND REEVALUATION PROCEDURES (34 CFR § 300.305; RULES II.H.)**

1. As part of any initial evaluation (if appropriate) and as part of any reevaluation, the IEP Team and other qualified professionals, as appropriate, must:
  - a. Review existing evaluation data on the student, including:
    - (1) Evaluations and information provided by the parent(s) of the student or the student who is an adult;
    - (2) Current classroom-based, local, or State assessments, and classroom-based observations; and
    - (3) Observations by teachers and related services providers; and
  - b. On the basis of that review, and input from the student's parent(s) or the adult student, identify what additional data, if any, are needed to determine:
    - (1) Whether the student is a student with a disability and the educational needs of the student; or, in the case of a reevaluation of a student, whether the student continues to have such a disability, and the educational needs of the student;

- (2) The present levels of academic achievement and related developmental needs of the student;
  - (3) Whether the student needs special education and related services; or, in the case of a reevaluation of a student, whether the student continues to need special education and related services; and
  - (4) Whether any additions or modifications to the special education and related services are needed to enable the student to meet the measurable annual goals set out in the IEP of the student and to participate, as appropriate, in the general education curriculum.
2. The IEP Team and other qualified professionals, as appropriate, may conduct its review of existing data without a meeting.
3. George Washington Academy must administer such assessments and other evaluation measures as may be needed to produce the data needed to determine continuing eligibility.
4. If the IEP Team and other qualified professionals, as appropriate, determine that no additional data are needed to determine whether the student continues to be a student with a disability and to determine the student's educational needs, the LEA must notify the student's parent(s) or student who is an adult of:
  - a. That determination and the reasons for the determination; and
  - b. The right of the parent(s) or student who is an adult to request an assessment to determine whether the student continues to be a student with a disability, and to determine the student's educational needs.
5. George Washington Academy is not required to conduct the assessment for reevaluation described in Rules II.H.4.b unless requested to do so by the student's parent(s) or the student who is an adult.
6. Evaluations before change in eligibility.
  - a. George Washington Academy must evaluate a student with a disability before determining that the student is no longer a student with a disability.
  - b. The evaluation is not required before the termination of a student's eligibility due to graduation from secondary school with a regular diploma, or due to exceeding the age eligibility for FAPE under State law (i.e., age 22).
  - c. For a student whose eligibility terminates due to graduation from secondary school with a regular high school diploma or due to exceeding the age eligibility for FAPE under State law, George Washington Academy must provide the student with a summary of the student's academic achievement and functional performance, which shall include recommendations on how to assist the student in meeting the student's postsecondary goals.

**II.I. DETERMINATION OF ELIGIBILITY (34 CFR § 300.306; RULES II.I.)**

1. Upon completion of the administration of assessments and other evaluation measures, a group of qualified professionals and the parents of the student or the student who is an adult determine eligibility under Part B of the IDEA and the Rules, including:
  - a. Whether that student is a student with a disability, and
  - b. The educational needs of the student.
2. George Washington Academy shall provide the parents or adult student with a copy of the evaluation report and the documentation of determination of eligibility.
3. A student must not be determined to be a student with a disability:
  - a. If the determinant factor for that determination is:
    - (1) Lack of appropriate instruction in the science of reading, including the essential components of reading instruction (explicit and systematic instruction in phonemic awareness, phonics, vocabulary development, reading fluency including oral reading skills, and reading comprehension strategies) (20 USC 6368(3));
    - (2) Lack of appropriate instruction in mathematics; or
    - (3) Limited English proficiency; and
  - b. If the student does not otherwise meet the eligibility criteria.
4. Procedures for determining eligibility and educational need.
  - a. In interpreting evaluation data for the purpose of determining if a student is a student with a disability and the educational needs of the student, George Washington Academy must:
    - (1) Draw upon information from a variety of sources, such as aptitude and achievement tests, parent or student who is an adult input, teacher recommendations, physical condition, social or cultural background, and adaptive behavior; and
    - (2) Ensure that information obtained from all of these sources is documented and carefully considered.
  - b. If a determination is made that a student has a disability and needs special education and related services, an IEP must be developed for the student within 30 calendar days.

**II.J. CATEGORICAL DEFINITIONS, CRITERIA, AND ASSESSMENTS (34 CFR § 300.8; 34 CFR § 300.304 34 CFR § 300.306; RULES II.J.)**

1. George Washington Academy has adopted the criteria and evaluation procedures, by category, for determining eligibility for a student with disabilities under Part B of the IDEA and the Rules II.J.1-13. Including: Specific Learning Disabilities (Rules II.J.11.).
  - a. Definition (34 CFR § 300.8(C)(10)); Rules II.J.11.a.
    - (1) *Specific learning disabilities* means a disorder in one or more of the basic psychological processes involved in understanding or in using language, spoken or written, that may manifest itself in the imperfect ability to listen, think, speak, read, write, spell, or do mathematical calculations, including conditions such as perceptual disabilities, brain injury, minimal brain dysfunction, dyslexia, and developmental aphasia, that affects a student’s educational performance.
    - (2) *Specific learning disabilities* does not include learning problems that are primarily the result of visual, hearing, or motor disabilities; of intellectual disability; of emotional behavioral disability; or of environmental, cultural, or economic disadvantage.
  - b. Procedures for Identifying Students with Specific Learning Disabilities (34 CFR § 300.307; Rules II.J.11.b).
    - (1) George Washington Academy has adopted the following method for determining a student’s eligibility under the specific learning disability category. An LEA may use one of the following methods for determining a student’s eligibility under the specific learning disability category:
      - (a) A Combination method of:
        - (i) A process based on the student’s response to scientific, research- based intervention called the Response to Intervention (RtI) method which shows the student does not make sufficient progress to meet age or State-approved grade-level standards in one or more of the areas identified in Rules II.J.10.b.(3)(a) (the group must refer to the USBE Specific Learning Disability Eligibility Guidelines when using this method), and,
        - (ii) A discrepancy analysis which considers if the student’s scores demonstrate a severe discrepancy between the student’s intellectual ability and academic achievement in one or more of the areas identified in Rules II.J.10.b.(3)(a) (the group must refer to the USBE Specific Learning Disability Eligibility Guidelines when using this method).
      - (2) Additional group members (34 CFR § 300.308; Rules II.J.11.b.(2)).

- (a) The determination of whether a student suspected of having a specific learning disability is a student with a disability must be made by the student's parent(s) or student who is an adult and a group of qualified professionals, which must include:
  - (b) The student's regular teacher; or
  - (c) If the student does not have a regular teacher, a regular classroom teacher qualified to teach a student of the student's age; or
  - (d) For a student of less than school age; an individual qualified by the USBE to teach a student of the student's age; and
  - (e) At least one person qualified to conduct individual diagnostic examinations of students and interpret the results of those assessments (as per the publisher's assessment administration criteria), such as a school psychologist, speech language pathologist, reading teacher or reading specialist, or special education teacher.
- (3) Determining the existence of a specific learning disability (34 CFR § 300.309; Rules II.J.11.b.(3)).
  - (a) The group described may determine that a student has a specific learning disability if:
    - (b) The student does not achieve adequately for the student's age or to meet State-approved grade-level standards in one or more of the following areas, when provided with learning experiences and instruction appropriate for the student's age or State-approved grade-level standards:
      - (i) Oral expression;
      - (ii) Listening comprehension;
      - (iii) Written expression;
      - (iv) Basic reading skills;
      - (v) Reading fluency skills;
      - (vi) Reading comprehension;
      - (vii) Mathematics calculation;
      - (viii) Mathematics problem solving.
  - (c) The group determines that its findings are not primarily the result of:
    - (i) A visual, hearing, or motor disability;
    - (ii) Intellectual disability;



- (iii) Emotional-behavioral disability;
  - (iv) Cultural factors;
  - (v) Environmental or economic disadvantage; or
  - (vi) Limited English proficiency.
- (4) The specific learning disability must adversely affect the student’s educational performance.
- (5) The student with the specific learning disability must need special education and related services (34 CFR § 300.8(a); Rules II.J.11.b.(5)).
- (6) The group must determine that the specific learning disability is the student’s primary disability.
- c. Evaluation (34 CFR § 300.309(b)–(c); Rules II.J.11.c).
- (1) An evaluation must include a variety of assessment tools and strategies and cannot rely on any single procedure as the sole criterion.
  - (2) To ensure that underachievement in a student suspected of having a specific learning disability is not due to lack of appropriate instruction in reading or math, the group must consider, as part of the evaluation:
    - (a) Data that demonstrate that prior to, or as a part of, the referral process, the student was provided appropriate instruction in regular education settings, delivered by qualified personnel; and
    - (b) Data-based documentation of repeated assessments of achievement at reasonable intervals, reflecting formal assessment of student progress during instruction, which was provided to the student’s parent(s) or the student who is an adult.
  - (3) George Washington Academy must promptly request parental consent or consent of the adult student to evaluate the student to determine if the student needs special education and related services, and must adhere to the 45-school-day evaluation timeframe, unless extended by mutual written agreement of the student’s parent(s) or student who is an adult and a group of qualified professionals:
    - (a) If, prior to a referral, a student has not made adequate progress after an appropriate period of time as determined by George Washington Academy when provided appropriate instruction, and
    - (b) Whenever a student is referred for an evaluation.
  - (4) Observation (34 CFR § 300.310(a)–(c); Rules II.J.11.b.(4)).

- (a) George Washington Academy must ensure that the student is observed in the student's learning environment (including the regular classroom setting) to document the student's academic performance and behavior in the areas of concern.
  - (b) The group must decide to:
    - (i) Use information from an observation in routine classroom instruction and monitoring of the student's performance that was done before the student was referred for an evaluation; or
    - (ii) Have at least one member of the group conduct an observation of the student's academic performance in the regular classroom after the student has been referred for an evaluation and parental consent or consent of the student who is an adult is obtained.
  - (c) If the student is a home-schooled student, George Washington Academy may determine how to conduct the observation and who will conduct it.
  - (d) In the case of a student of less than school age or who is out of school, a group member must observe the student in an environment appropriate for a student of that age.
- (5) Specific documentation for the eligibility determination (34 CFR § 300.311; Rules II.J.11.b.(5)). The group's documentation of the determination of eligibility with a specific learning disability must contain a statement of:
- (a) Whether the student has a specific learning disability;
  - (b) The basis for making the determination, including an assurance that the determination has been made in accordance with Rules II.I.;
  - (c) The relevant behavior, if any, noted during the observation of the student and the relationship of that behavior to the student's academic functioning;
  - (d) The educationally relevant medical findings, if any; and
  - (e) Whether the student meets the criteria below.
  - (f) Combination (RtI and discrepancy analysis). Does not make sufficient progress to meet State-approved age- or grade-level standards when using a process based on the student's response to scientific evidence-based interventions and considers scores that demonstrate a severe discrepancy between the student's academic achievement and intellectual ability in one or more of the areas of specific learning disability (the group must refer to the USBE Specific Learning Disability Eligibility Guidelines when using this method).

- (i) George Washington Academy has a process that assesses a student's response to scientific, research-based intervention as part of determining if the student has a specific learning disability. This process must include:
  - (ii) High quality research-based instruction delivered by qualified staff in the general education setting; and
  - (iii) Assessment of student performance that specifically includes universal screening and progress-monitoring; and
  - (iv) Multiple tiers of evidence-based interventions to address individual student difficulties; and
  - (v) Documentation of systematic and regular parent, student who is an adult, and/or family involvement and communication as well as notification about:
    - (A) The State's policies regarding the amount and nature of student performance data that would be collected and the general education services that would be provided (the group must refer to the USBE Specific Learning Disability Eligibility Guidelines when using this method);
    - (B) Strategies for increasing the student's rate of learning; and
    - (C) The parent(s)' or the student's, who is an adult, right to request an evaluation; and
- (vi) System supports (e.g., leadership, problem-solving, data management systems, coaching and collaboration, professional learning, and measures of fidelity) in place to ensure effective implementation; or
- (vii) The instructional strategies used and the student-centered data collected.
- (viii) The group must document that the student's performance on a standardized, norm-referenced, individually administered achievement measure in the area of the suspected disability, and
- (ix) That the student scored above the intellectual disability range on a standardized, norm-referenced, individually administered measure of intellectual ability, and
  - (A) The comparison of the standard scores on the tests of achievement and intellectual ability using an LEA board-approved and USBE-reviewed discrepancy analysis. The group must document consideration of the discrepancy analysis and the

group's determination of whether or not it represents a severe discrepancy.

- (6) The determination of the group concerning the effects of a visual, hearing, or motor disability; intellectual disability; emotional- behavioral disability; cultural factors; environmental or economic disadvantage; or limited English proficiency on the student's achievement level;
- (7) The requirements of Rules II.D.–H. must be met.
- (8) Each group member must certify in writing whether the report reflects the member's conclusion (§ 300.311(b)). If it does not reflect the member's conclusion, the group member must submit a separate statement presenting the member's conclusions.

### **III. IEP DEVELOPMENT AND SERVICE DELIVERY**

#### **III.A. INDIVIDUALIZED EDUCATION PROGRAM (IEP) (RULES III.A.)**

1. George Washington Academy implements the following IEP requirements, including the Least Restrictive Environment (LRE) requirements, consistent with Part B of the IDEA and the Rules, as well as R277-750, R277-800, and R277-801.

#### **III.B. WHEN IEPS MUST BE IN EFFECT (34 CFR § 300.323; RULES III.B.)**

1. At the beginning of each school year, George Washington Academy must have an IEP in effect for each student with a disability within its jurisdiction.
2. George Washington Academy must ensure that:
  - a. A meeting to develop an IEP for a student is conducted within 30 calendar days of a determination that the student needs special education and related services; and
  - b. As soon as possible following development of the IEP, special education and related services are made available to the student in accordance with the student's IEP.
  - c. George Washington Academy must ensure that the student's IEP is:
    - (1) Accessible to each regular education teacher, special education teacher, related service provider, and any other service provider who is responsible for its implementation; and
    - (2) Each teacher and provider is informed of:
      - (a) The teacher's specific responsibilities related to implementing the student's IEP; and
      - (b) The specific accommodations, modifications, and supports that must be provided for the student in accordance with the IEP.
3. Documentation of IEP implementation shall be provided to USBE upon request.

#### **III.C. STUDENTS WHO TRANSFER (34 CFR § 300.323; RULES III.C.)**

1. Transfers within Utah.
  - a. In the case of a student with a disability with a current IEP who transfers from one LEA to another within the State within the same school year and enrolls in a new school, George Washington Academy, in consultation with the parent(s) or student who is an adult, must provide a FAPE to the student, including services comparable to those described in the previously held IEP, until such time as George Washington Academy:
    - (1) Adopts the previously held IEP, or

- (2) Develops, adopts, and implements a new IEP that is consistent with Federal regulations and the Rules.
  - b. The requirements of 34 CFR § 300.323 also apply for students transferring from an LEA placement to a local juvenile or adult correctional facility or temporary State placement for observation and assessment.
2. Transfers from out of State.
- a. In the case of a student with a disability with a current IEP who transfers LEAs within the same school year, who enrolls in a new school, and who has an IEP that was in effect in another State, George Washington Academy, in consultation with the parent(s) or student who is an adult, must provide the student with a FAPE, including services comparable to those described in the previously held IEP, until George Washington Academy:
    - (1) Conducts an evaluation, if determined to be necessary by George Washington Academy; and
    - (2) Develops a new IEP, if appropriate, that is consistent with Federal and State law.
  - b. The evaluation for eligibility that may be conducted by George Washington Academy is considered an initial evaluation, not a reevaluation (71 Federal Register 4668- 82).
3. To facilitate the transition for a student described above:
- a. George Washington Academy must take reasonable steps to promptly obtain the student's records, including the IEP and supporting documents and any other records relating to the provision of special education or related services to the student, from the previous LEA in which the student was enrolled; and
  - b. The previous LEA in which the student was enrolled must take reasonable steps to promptly respond to the request from George Washington Academy.
  - c. The LEA transferring the records must keep a copy of the records for at least three years after the transfer as outlined in Rule VIII.S.
4. Experiencing difficulty in obtaining the IEP from the previous LEA does not relieve the LEA where the student is currently enrolled of its obligation to have a current IEP in place for a student who is eligible.

**III.D. LEA RESPONSIBILITY FOR IEP MEETINGS (34 CFR § 300.323(C)(1); RULES III.D.)**

1. George Washington Academy is responsible for initiating and conducting meetings for the purpose of developing, reviewing, and revising the IEP of a student with a disability age 3 through 21, consistent with the Rules.
2. A meeting to develop an IEP for a student who is eligible must be conducted within 30 calendar days of a determination that a student needs special education and related services.

**III.E. IEP TEAM MEMBERSHIP (34 CFR § 300.321; RULES III.E.)**

1. George Washington Academy must ensure that the IEP Team for each student with a disability includes:
  - a. The parents of the student or the student who is an adult;
  - b. Not less than one regular education teacher of the student (if the student is, or may be, participating in the regular education environment);
  - c. Not less than one special education teacher of the student, or where appropriate, not less than one special education provider of the student;
  - d. A representative of George Washington Academy who:
    - (1) Is qualified to provide, or supervise the provision of, specially designed instruction to meet the unique needs of students with disabilities;
    - (2) Is knowledgeable about the general education curriculum; and
    - (3) Is knowledgeable about the availability of resources of the LEA.
    - (4) George Washington Academy may designate a George Washington Academy member of the IEP Team to also serve as the LEA representative, if the above criteria are satisfied.
  - e. A representative of USDB and the LEA of residence when the student's placement is at USDB, when the IEP Team is considering placement at USDB, or when the student receives 180 minutes or more of special education and/or related services from USDB.
  - f. An individual who can interpret the instructional implications of evaluation results, who may be a member of the team described in this section of the Rules;
  - g. At the discretion of the parent or student who is an adult or the LEA, other individuals who have knowledge or special expertise regarding the student, including related services personnel as appropriate; and
  - h. Whenever appropriate, the student with a disability.
  - i. The determination of knowledge or special expertise of any individual described in the Rules III.E.6 above must be made by the party (parents or student who is an adult or LEA) who invited the individual to be a member of the IEP Team.
  - j. If a purpose of the IEP Team meeting is consideration of the postsecondary goals for the student and the postsecondary transition services needed to assist the student in reaching those goals, the LEA must invite the student with a disability to attend the student's IEP meeting. If the student does not attend the IEP meeting, George Washington Academy must take other steps to ensure that the student's preferences and interests are considered.

- k. To the extent appropriate, with the written consent of the parents or student who is an adult, George Washington Academy must invite a representative of any participating agency that is likely to be responsible for providing or paying for postsecondary transition services.
- l. Signatures on an IEP denote participation of IEP Team members in the development of the IEP.

**III.F. IEP TEAM ATTENDANCE (34 CFR § 300.321; RULES III.F.)**

1. A required member of the IEP Team is not required to attend a particular IEP Team meeting, in whole or in part, if the parents of a student with a disability or student who is an adult and the LEA agree, in writing, that the attendance of the member is not necessary because the member's area of the curriculum or related services is not being modified or discussed in the meeting.
2. A required member of the IEP Team may be excused from attending an IEP meeting, in whole or in part, when the meeting involves a modification to or discussion of the member's area of the curriculum or related services, if:
  - a. The parents or student who is an adult, in writing, and the LEA consent to the excusal; and
  - b. The member submits, in writing, to the parents or student who is an adult and the IEP Team, input into the development of the IEP prior to the meeting.

**III.G. PARENT PARTICIPATION (34 CFR § 300.322; RULES III.G.)**

1. George Washington Academy must take steps to ensure that one or both of the parents of a student with a disability or the student who is an adult are present at each IEP meeting or are afforded the opportunity to participate, including:
  - a. Notifying parents or student who is an adult of the meeting early enough to ensure that they will have an opportunity to attend; and
  - b. Scheduling the meeting at a mutually agreed-on time and place.
2. If the parents or student who is an adult cannot attend, George Washington Academy must use other methods to ensure participation of the parents or the student who is an adult, including individual or conference telephone calls. The parents of a student with a disability or the student who is an adult and George Washington Academy may agree to use alternative means of meeting participation, such as video conferences and conference calls (34 CFR § 300.328).
3. A meeting may be conducted without a parent or the student who is an adult in attendance if George Washington Academy is unable to convince the parent(s) or the student who is an adult that they should attend. In this case, George Washington Academy must keep a record of its attempts to arrange a mutually agreed-on time and place, such as:



- a. Detailed records of telephone calls made or attempted and the results of those calls;
  - b. Copies of correspondence sent to the parents or student who is an adult and any responses received; and
  - c. Detailed records of visits made to the parents' or student who is an adult home or place of employment and the results of those visits.
4. George Washington Academy must take whatever action is necessary to ensure that the parent(s) or student who is an adult understands the proceedings of the IEP Team meeting, including arranging for an interpreter for parent(s) or student who is an adult with deafness or whose native language is other than English.
- a. Under UCA 35A-13-604, an individual is required to be certified as an interpreter if that individual provides interpreter services for deaf and hard of hearing individuals.
  - b. An individual providing interpreting services other than those for deaf and hard of hearing individuals shall be trained.
5. The parent(s) of a student with a disability or student who is an adult are participants along with school personnel in developing, reviewing, and revising the IEP for their student. This is an active role in which the parent(s) or student who is an adult:
- a. Provide critical information regarding the strengths of the student and express their concerns for enhancing the education of the student;
  - b. Participate in the discussion of the student's need for special education and related services, and supplementary aids and services; and
  - c. Join with other participants in deciding how the student will be involved and progress in the general curriculum, how the student will participate in State- and LEA-wide assessments, and what services George Washington Academy will provide to the student and in what setting.
6. George Washington Academy must give the parent(s) or adult student a copy of the student's IEP at no cost to the parent(s) or student who is an adult.

### **III.H. NOTICE OF MEETING (34 CFR § 300.322; RULES III.H.)**

1. The notice of meeting required to be provided to the parent(s) or student who is an adult must:
  - a. Indicate the purpose, time, and location of the meeting and who will be in attendance; and
  - b. Inform the parent(s) or student who is an adult of the provision for participation of other individuals who have knowledge or special expertise about the student on the IEP Team.

- c. Inform the parent(s) that at their request the Part C service coordinator or other representatives of the Part C system may be invited to participate at the initial IEP Team meeting for a student previously served under Part C of the IDEA.
2. For a student with a disability, ages 14 and older, or younger if determined appropriate by the IEP Team, the IEP notice of meeting also must:
  - a. Indicate that a purpose of the meeting will be the consideration of the postsecondary goals and postsecondary transition services for the student; and
  - b. Indicate that George Washington Academy will invite the student; and
  - c. Identify any other agency that will be invited, with parental or student who is an adult consent, to send a representative.
3. When conducting IEP Team meetings and placement meetings and carrying out administrative matters, the parent(s) of a student with a disability or student who is an adult and George Washington Academy may agree to use alternative means of meeting participation such as video conferences and conference calls (34 CFR § 300.328).

### **III.I. DEVELOPMENT, REVIEW, AND REVISION OF THE IEP (34 CFR § 300.324; RULES III.I.)**

1. Development, review, and revision of the IEP.
  - a. In developing each student's IEP, the IEP Team must consider:
    - (1) The strengths of the student;
    - (2) The concerns of the parent(s) or adult student for enhancing the education of the student;
    - (3) The results of the initial or most recent evaluation of the student, and
    - (4) The academic, developmental, and functional needs of the student.
  - b. The IEP Team, in conducting a meeting to develop, review and, if appropriate, revise a student's IEP, must consider the following special factors:
    - (1) In the case of a student with limited English proficiency (LEP), consider the language needs of the student as those needs relate to the student's IEP;
    - (2) In the case of a student who is blind or visually impaired, provide for instruction in braille and the use of braille unless the IEP Team determines, after an evaluation of the student's reading and writing skills, needs, and appropriate reading and writing media (including an evaluation of the student's future needs for instruction in braille or the use of braille), that instruction in braille or the use of braille is not appropriate for the student;
      - (a) Prior to determining whether a student who is blind should use braille as the primary reading mode, the student's IEP Team must be provided (through

pertinent literature or discussions with competent braille users and educators, or both) with detailed information about the use and efficiency of braille as a reading medium, in order to make an informed choice as to the student's primary reading.

- (3) Consider the communication needs of the student and, in the case of a student who is deaf or hard of hearing, consider the student's language and communication needs, opportunities for direct communication with peers and professional personnel in the student's language and communication mode, academic level, and full range of needs, including opportunities for direct instruction in the student's language and communication mode;
- (4) Consider whether the student needs assistive technology devices and services in school and on a case-by-case basis, in a student's home or other setting; and
- (5) In the case of a student whose behavior impedes the student's learning or that of others, consider the use of positive behavior interventions and supports, and other strategies (e.g., conduct a functional behavior assessment, develop a behavior intervention plan), to address that behavior.
  - (a) When making decisions on behavior interventions, the IEP Team must refer to the USBE Technical Assistance (TA) manual that outlines the Least Restrictive Behavior Interventions (LRBI) for information on research-based intervention procedures.
    - (i) Emergency safety interventions may only be included in an IEP as a planned intervention when the IEP Team agrees that less restrictive means which meet circumstances in R277-608 have been attempted, an FBA has been conducted, and a BIP based on data analysis has been developed and implemented (R277-609).
    - (b) The purpose of the LRBI related to the use of positive behavior supports and behavior interventions in schools is to:
      - (i) Protect the safety and well-being of all students;
      - (ii) Provide protection for students, teachers, other school personnel, and LEAs; and
      - (iii) Ensure that parent(s) or students who is an adult are involved in the consideration and selection of behavior interventions to be used.
    - (c) When an emergency situation occurs that requires the immediate use of an emergency safety intervention to protect the student or others from harm, the staff shall comply with requirements in R277-609 with regards to time limitations and parental or student who is an adult notification.

- (d) As appropriate, the student should receive an FBA and behavior intervention services and modifications that are designed to address the behavior (34 CFR § 300.530(d)(1)(ii)).
  - c. If, in considering the special factors described above, the IEP Team determines that a student needs a particular device or services for educational purposes (including an intervention, accommodation, or other program modification) in order for the student to receive a FAPE, the IEP Team must include a statement to that effect in the student's IEP.
  - d. A regular education teacher of a student with a disability, as a member of the IEP Team, must, to the extent appropriate, participate in the development of the IEP of the student, including the determination of:
    - (1) Appropriate positive behavior interventions and supports and other strategies for the student; and
    - (2) Supplementary aids and services, program modifications, and support for school personnel consistent with the IEP.
- 2. Changes to the IEP.
  - a. In making changes to a student's IEP after the annual IEP Team meeting for a school year, the parent(s) of a student with a disability or student who is an adult and George Washington Academy may agree not to convene an IEP meeting for the purposes of making those changes, and instead may develop a written document to amend or modify the student's current IEP.
    - (1) The LEA shall convene a meeting with the IEP Team regarding material or substantial changes to the IEP (e.g., the amount of service time, change in placement, termination of services).
  - b. Upon request, the parent(s) or student who is an adult must be provided with a revised copy of the IEP with the amendments incorporated.
  - c. If changes are made to the student's IEP through the amendment process, George Washington Academy must ensure that the student's IEP Team is informed of those changes.
- 3. To the extent possible, George Washington Academy must encourage the consolidation of reevaluation meetings and other IEP Team meetings for the student (34 CFR § 300.324(a)(5)).
- 4. Review and revision of the IEP.
  - a. George Washington Academy must ensure that the IEP Team:
    - (1) Reviews the student's IEP periodically, but not less than annually, to determine whether the annual goals for the student are being achieved; and

- (2) Revises the IEP, as appropriate, to address:
  - (a) Any lack of expected progress toward the annual goals in the IEP and in the general education curriculum, if appropriate;
  - (b) The results of any reevaluation;
  - (c) Information about the student provided to, or by, the parent(s) or adult student;
  - (d) The student's anticipated needs; or
  - (e) Other matters.
- (3) In conducting a review of the student's IEP, the IEP Team must consider the special factors in the Rules III.I.1.b.
- (4) A regular education teacher of the student, as a member of the IEP Team, must participate in the review and revision of the IEP of the student, if the student is or may be participating in the general education classroom.
- (5) If a participating agency, other than George Washington Academy, fails to provide the postsecondary transition services described in the IEP, George Washington Academy must reconvene the IEP Team to identify alternative strategies to meet the postsecondary transition objectives for the student set out in the IEP.
- (6) Nothing in this part relieves any participating agency, including a State vocational rehabilitation agency, of the responsibility to provide or pay for any postsecondary transition service that the agency would otherwise provide to students with disabilities who meet the eligibility criteria of that agency.

**III.J. DEFINITION OF THE INDIVIDUALIZED EDUCATION PROGRAM (IEP) (34 CFR § 300.320; RULES III.J.)**

1. The term *individualized education program* (IEP) means a written statement for each student with a disability that is developed, reviewed, and revised in a meeting. The IEP is designed to meet the student's unique needs based on their disability, and prepare them for further education, employment, and independent living.
2. The IEP must include:
  - a. A statement of the student's present levels of academic achievement and functional performance (PLAAFP), including:
    - (1) How the student's disability affects the student's involvement and progress in the general education curriculum (i.e., the same grade-level curriculum as for students who are non-disabled); or

- (2) For students in preschool, as appropriate, how the disability affects the student's participation in appropriate activities; and
  - (3) For students who are blind, the results obtained from a braille-related or braille skills assessment;
- b. A statement of measurable annual goals, that describes what the student is reasonably expected to accomplish in a year and the conditions in which the goals will be performed, including academic and functional goals designed to:
  - (1) Meet the student's needs that result from the student's disability to enable the student to be involved in and make progress in the grade-level general education curriculum; and
  - (2) Meet each of the student's other educational needs that result from the student's disability;
- c. For a student with a disability, ages 14 and older, an annual IEP goal related to the student's postsecondary transition service needs.
- d. For eligible students with significant cognitive disabilities who will participate in grade-level alternate achievement standards (i.e., Essential Elements):
  - (1) Notification to the parent(s) or adult student that the student's academic achievement will be measured through an assessment of the grade-level Utah alternate achievement standards and how participation in such alternate achievement assessments may delay or otherwise affect the student from completing the requirements for a regular high school diploma; and
  - (2) A description of benchmarks or short-term objectives for each annual goal;
- e. A description of:
  - (1) How the student's progress toward meeting the annual IEP goals will be measured; and
  - (2) When periodic reports to the parent(s) or adult student on the progress the student is making toward meeting the annual IEP goals (such as through the use of quarterly or other periodic reports, concurrent with the issuance of report cards) will be provided;
- f. A statement of the special education and related services and supplementary aids and services (including assistive technology), based on peer-reviewed research to the extent practicable, to be provided to the student, or on behalf of the student, and a statement of the program modifications or supports for school personnel that will be provided to enable the student:
  - (1) To advance appropriately toward attaining the annual goals;

- (2) To be involved in and make progress in the grade-level general education curriculum, and to participate in extracurricular and other nonacademic activities; and
  - (3) To be educated and participate with other similar-aged students with disabilities and non-disabled students in the activities described in this section;
- g. An explanation of the extent, if any, to which the student will not participate with similar-aged non-disabled students in the regular education environment and in the activities described in this section;
- h. A statement of:
  - (1) Any individual appropriate accommodations that are necessary to measure the academic achievement and functional performance of the student on all grade-level State- and LEA-wide assessments; and
  - (2) If the IEP Team determines that the student must take an alternate assessment instead of a particular regular State- or LEA-wide assessment of student achievement, a statement of why:
    - (a) The student cannot participate in the regular assessment; and
    - (b) The particular alternate assessment selected is appropriate for the student; and
    - (c) All students, including students with disabilities, participate in statewide assessments. George Washington Academy reports the results of statewide assessments on the website. If more than one percent of students with significant cognitive disabilities participate in an alternate assessment, George Washington Academy will submit justification to the USBE on the need to exceed the cap.
- i. The projected date for the beginning of the services and modifications, and the anticipated frequency, location, and duration of those services and modifications.
- j. A statement of school to post-school transition services.
  - (1) For a student with a disability, ages 14 and older, or younger if determined appropriate by the IEP Team, and updated annually thereafter, the IEP must include:
  - (2) Appropriate measurable postsecondary goals based upon age- appropriate postsecondary transition assessments related to training or education, employment, and, where appropriate, independent living skills; and
  - (3) The postsecondary transition services (including courses of study) needed to assist the student in reaching those goals.
- k. Transfer of rights at age of majority.

- (1) Beginning not later than one year before the student reaches the age of majority (age 18 in Utah), the IEP must include a statement that the student has been informed of the student's rights under Part B of the IDEA that will transfer to the student on reaching the age of majority. The transfer of rights also occurs upon notification to the LEA that a student has married or become emancipated before age 18.
- l. Nothing in this section shall be construed to require that additional information be included in a student's IEP beyond what is explicitly required in Section 614 of Part B of the IDEA, or require the IEP Team to include information under one component of a student's IEP that is already contained under another component of the student's IEP.
- m. IEP Teams should discuss and address, if appropriate, student participation in not only the grade-level Utah Core Standards, but other general education activities and courses (e.g., health and maturation, suicide prevention), as well as the Statewide Online Education Program (SOEP) or other online, distance, blended, or competency-based courses, as well as courses taken through Career and Technical Education (CTE) programs and concurrent enrollment. Students with disabilities may require special education and related services and accommodations for equitable participation, in conjunction with Part B of the IDEA, the Rules, R277-418, R277-713, and R277-726.

### **III.K. PHYSICAL EDUCATION 34 CFR § 300.108 (RULES III.L.)**

1. Physical education services, specially designed if necessary, must be made available to every student with a disability receiving a FAPE, unless George Washington Academy enrolls students without disabilities and does not provide physical education to students without disabilities in the same grades.
2. Each student with a disability must be afforded the opportunity to participate in the regular physical education program available to students who are nondisabled unless:
  - a. The student is enrolled full time in a separate facility; or
  - b. The student needs specially designed physical education, as prescribed in the student's IEP.
3. If specially designed physical education (e.g., adapted physical education) is prescribed in a student's IEP, the LEA responsible for the education of that student must provide the services directly or make arrangements for those services to be provided through other public or private programs.
4. George Washington Academy responsible for the education of a student with a disability who is enrolled in a separate facility must ensure that the student receives appropriate physical education services. PE.



**III.L. ASSISTIVE TECHNOLOGY (34 CFR § 300.105; R277-495; RULES III.M.)**

1. George Washington Academy must ensure that assistive technology devices or assistive technology services, or both, are made available to a student with a disability if required as a part of the student's:
  - a. Special education,
  - b. Related services, or
  - c. Supplementary aids and services.
2. On a case-by-case basis, the use of school-purchased assistive technology devices in a student's home or in other settings is required if the student's IEP Team determines that the student needs access to those devices in order to receive a FAPE.es.

**III.M. EXTENDED SCHOOL YEAR (ESY) SERVICES (34 CFR § 300.106; R277-751; RULES III.N.)**

1. Extended school year services mean special education and related services that:
  - a. Are provided to an eligible student with a disability:
    - (1) Beyond the normal school year of George Washington Academy;
    - (2) In accordance with the student's IEP; and
    - (3) At no cost to the parent(s) of the student or student who is an adult; and
  - b. Meet the standards of the USBE in R277-751.
2. George Washington Academy shall ensure that:
  - a. Extended school year services are available as necessary to provide FAPE, consistent with the Rules and considered for each individual student with a disability during an IEP, based upon a review of multiple data sources and factors.
  - b. ESY student programs are provided in the least restrictive environment.
  - c. ESY teachers and paraeducators meet USBE's and IDEA requirements.
3. Extended school year services must be provided only if a student's IEP Team determines, on an individual basis, that the services are necessary for the provision of a FAPE to the student. The annual IEP shall reflect the IEP Team's decision regarding the need for ESY services.
  - a. Parent(s) or the student who is an adult shall be provided with prior written notice of proposal or refusal to provide ESY services.
  - b. If determined as eligible for ESY services, the IEP Team shall determine the appropriate ESY program, based on the student's individual needs.

- c. ESY eligibility decisions and prior written notice of ESY programs shall be provided to parent(s) or student who is an adult in sufficient time to permit accessing dispute resolution options of the procedural safeguards, in the event of a dispute.
4. In implementing the requirements of this section, George Washington Academy may not:
  - a. Limit extended school year services to particular categories of disability, age, or grade level;
  - b. Unilaterally limit the type, amount, or duration of those services; or
  - c. Limit data consideration by IEP Teams to only an analysis of regression and recoupment.

**III.N. LEAST RESTRICTIVE ENVIRONMENT (LRE) (34 CFR § 300.114; RULES III.O.)**

1. George Washington Academy must ensure that:
  - a. To the maximum extent appropriate, students with disabilities, including students in public or private institutions or other care facilities (e.g., nursing homes), are educated with similar-aged students who are nondisabled; and
  - b. Special classes, separate schooling, or other removal of students with disabilities from the regular educational environment occurs only if the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily. In the case of a student who is deaf or hard of hearing, consideration of a special class or school may be the least restrictive environment in that it provides opportunities for direct communication and instruction in the student’s language and communication mode with professional personnel and peers.
  - c. LRE provisions apply to transition programs (i.e., postsecondary) and placement.
2. A state funding mechanism must not result in placements that violate the LRE requirements of the Rules III.P.–S.

**III.O. INCLUSIONARY PRACTICES TO PROVIDE A FULL EDUCATIONAL OPPORTUNITY (34 CFR § 300.109; RULES III.P.)**

1. George Washington Academy must develop inclusionary practices that include the components in the definition using evidence-based practices. LEA’s may benefit from USBE Technical Assistance, and other resources.

**III.P. CONTINUUM OF ALTERNATIVE PLACEMENTS (34 CFR § 300.115; RULES III.Q.)**

1. George Washington Academy must ensure that a continuum of alternative placements is available to meet the needs of students with disabilities for special education and related services.

2. The continuum required must:
  - a. Include the following alternative placements for instruction:
    - (1) Regular classes,
    - (2) Special classes,
    - (3) Special schools,
    - (4) Home instruction, and
    - (5) Instruction in hospitals and institutions; and
  - b. Make provision for supplementary services (such as resource room or itinerant instruction) to be provided in conjunction with regular class placement.

**III.Q. PLACEMENTS (34 CFR § 300.116; RULES III.R.)**

1. In determining the educational placement of a student with a disability, including postsecondary transition-aged student with a disability, George Washington Academy must ensure that:
  - a. The placement decision:
    - (1) Is made by a group of persons, including the parent(s) or student who is an adult and other persons knowledgeable about the student, the meaning of the evaluation data, and the placement options; and
    - (2) Is made in conformity with the LRE provisions above.
  - b. The student's placement:
    - (1) Is determined at least annually;
    - (2) Is based on the student 's IEP; and
    - (3) Is as close as possible to the student 's home;
  - c. Unless the IEP of a student with a disability requires some other arrangement, the student is educated in the school that the student would attend if nondisabled;
  - d. In selecting the LRE, consideration is given to any potential harmful effect on the student or on the quality of services that the student needs; and
  - e. A student with a disability is not removed from education in age- appropriate regular classrooms solely because of needed modifications in the general education curriculum.

**III.R. PARENTAL INVOLVEMENT IN PLACEMENT DECISIONS (34 CFR §§ 300.327, 300.501; RULES III.S.)**

1. George Washington Academy shall ensure that the parent(s) of each student with a disability or adult student are members of any group that makes decisions on the educational placement of the parent's student or the student who is an adult (Rules IV.B).
2. In implementing this requirement, George Washington Academy shall use procedures for parent or student who is an adult involvement in placement decisions consistent with those used for parent participation in IEP meetings.
3. If neither parent or the student who is an adult can participate in a meeting in which a decision is to be made relating to the educational placement of the student, George Washington Academy shall use other methods to ensure their participation, including individual or conference telephone calls or video conferencing.
4. A group may make a placement decision without the involvement of the parent(s) or student who is an adult if George Washington Academy is unable to obtain either parent's or student who is an adult participation in the decision. In this case, the LEA must have a record of its attempts to ensure their involvement.

**III.S. NONACADEMIC SETTINGS AND EXTRACURRICULAR ACTIVITIES (34 CFR § 300.117; UCA 53G-6-709; RULES III.T.)**

1. In providing or arranging for the provision of nonacademic and extracurricular services and activities, including meals, recess periods, and the services and activities in Rules III.V, George Washington Academy must ensure that each student with a disability participates with students who are nondisabled in the extracurricular services and activities to the maximum extent appropriate to the needs of that student.
2. George Washington Academy must ensure that each student with a disability has the supplementary aids and services determined by the student's IEP Team to be appropriate and necessary for the student to participate in nonacademic settings.
3. A student with a disability (under the age of 22 who has not graduated from high school with a regular high school diploma, whose IEP Team recommends participation) may not be denied the opportunity of participating in public school programs or extracurricular activities solely because of the student's age, unless the participation threatens the health or safety of the student. George Washington Academy, in cooperation with the Utah Department of Health, shall establish criteria used to determine the health and safety factor (UCA 53G-6- 709).

**III.T. NONACADEMIC SERVICES (34 CFR § 300.107; RULES III.U.)**

1. George Washington Academy must take steps, including the provision of supplementary aids and services determined appropriate and necessary by the student's IEP Team, to provide nonacademic and extracurricular services and activities in the manner necessary to

afford students with disabilities an equal opportunity for participation in those services and activities.

2. Nonacademic and extracurricular services and activities may include counseling services, athletics, transportation, health services, recreational activities, special interest groups or clubs sponsored by George Washington Academy, referrals to agencies that provide assistance to individuals with disabilities, and employment of students, including both employment by George Washington Academy and assistance in making outside employment available.

## **IV. PROCEDURAL SAFEGUARDS DUE PROCESS PROCEDURES FOR PARENT(S) AND STUDENTS (IDEA SUBPART E)**

1. Consistent with the requirements of Part B of the IDEA and the Rules George Washington Academy shall establish, maintain, and implement procedural safeguards for students with disabilities and their parent(s) or students who is an adult. (34 CFR § 300.500).

### **IV.A. PARENTAL OPPORTUNITY TO EXAMINE RECORDS AND PARTICIPATE IN MEETINGS (34 CFR § 300.501; RULES IV.A.)**

1. Opportunity to examine records.
  - a. The parent(s) of a student with a disability or student who is an adult must be afforded, in accordance with the Rules, an opportunity to inspect and review all education records with respect to the identification, evaluation, and educational placement of the student and the provision of a FAPE to the student.
2. Parent participation in meetings.
  - a. The parent(s) of a student with a disability or student who is an adult must be afforded an opportunity to participate in meetings with respect to the identification, evaluation, and educational placement of the student and the provision of a FAPE to the student.
  - b. George Washington Academy must provide notice, consistent with the Rules, to ensure that parents of students with disabilities or adult students have the opportunity to participate in meetings.
  - c. A meeting does not include informal or unscheduled conversations involving George Washington Academy personnel and conversations on issues such as teaching methodology, lesson plans, or coordination of service provision. A meeting also does not include preparatory activities that George Washington Academy personnel engage in to develop a proposal or a response to a parent or student who is an adult proposal that will be discussed at a later meeting.
3. Parent involvement in placement decisions.
  - a. George Washington Academy must ensure that a parent of each student with a disability or student who is an adult is a member of any group that makes decisions on the educational placement of the parent's student (34 CFR § 300.327), including notifying the parent(s) or student who is an adult of the meeting early enough to ensure that they will have an opportunity to attend and scheduling the meeting at a mutually agreed-on time and place (34 CFR § 300.322(a)).
  - b. The notice of meeting must indicate the purpose(s), time, and location of the meeting, who will be in attendance, and inform the parents or student who is an adult of their

right to bring other individuals who have knowledge or special expertise about the student (34 CFR § 300.322(b)).

- c. If neither parent or the student who is an adult can participate in a meeting in which a decision is to be made relating to the educational placement of the student, George Washington Academy must use other methods to ensure their participation, including individual or conference telephone calls or video conferencing.
- d. A placement decision may be made by a group without the involvement of a parent or student who is an adult if George Washington Academy is unable to obtain the parents or student who is an adult participation in the decision. In this case, George Washington Academy must have a record of its attempt to ensure their involvement.

#### **IV.B. INDEPENDENT EDUCATIONAL EVALUATION (34 CFR § 300.502; RULES IV.B.)**

1. Definitions.
  - a. *Independent educational evaluation (IEE)* means an evaluation conducted by a qualified examiner who is not employed by George Washington Academy responsible for the education of the student in question.
  - b. *Public expense* means that George Washington Academy either pays for the full cost of the evaluation or ensures that the evaluation is otherwise provided at no cost to the parent or student who is an adult.
2. George Washington Academy has established and implemented policies and procedures related to independent educational evaluation that meet the requirements of Part B of the IDEA and the Rules.
3. The following requirements must be addressed:
  - a. The parents of a student with a disability or student who is an adult have the right to obtain an IEE of the student at public expense if they disagree with an evaluation obtained by George Washington Academy.
  - b. George Washington Academy must provide to the parents or student who is an adult, upon request for an IEE, information about where an IEE may be obtained and the George Washington Academy criteria applicable for IEEs.
  - c. If a parent or student who is an adult requests an IEE at public expense, George Washington Academy must, without unnecessary delay, either:
    - (1) File a request for a due process complaint and hearing to show that its evaluation is appropriate; or
    - (2) Ensure that an IEE is provided at public expense, unless George Washington Academy demonstrates in a due process hearing that the evaluation obtained by the parent or student who is an adult did not meet George Washington Academy criteria.

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- d. If George Washington Academy files a due process complaint and request for hearing, and the final decision is that George Washington Academy's evaluation is appropriate, the parent or student who is an adult still has the right to an IEE, but not at public expense.
  - e. If a parent or student who is an adult requests an IEE, George Washington Academy may ask for the parents' or student who is an adult's reason why the student who is an adult objects to the public evaluation. However, the explanation by the parent or student who is an adult may not be required and George Washington Academy may not unreasonably delay either providing the IEE at public expense or requesting a due process hearing to defend the public evaluation.
  - f. A parent or student who is an adult is entitled to only one IEE at public expense each time George Washington Academy conducts an evaluation with which the parent or adult student who is an adult disagrees.
  - g. If the parent or adult student who is an adult either obtains an IEE at public expense or shares an evaluation obtained at private expense with George Washington Academy, the results of the evaluation:
    - (1) Must be considered by George Washington Academy, in any decision made with respect to the provision of a FAPE to the student provided that the IEE meets George Washington Academy criteria; and
    - (2) May be presented by any party as evidence at a hearing on a due process complaint regarding that student.
  - h. If a hearing officer requests an IEE as part of a due process hearing, the cost of the evaluation must be at public expense.
  - i. If an IEE is at public expense, the criteria under which the evaluation is obtained, including the location of the evaluation and the qualifications of the examiner, must be the same as the criteria that George Washington Academy uses when it initiates an evaluation, to the extent those criteria are consistent with the parent's or student who is an adult right to an IEE.
  - j. Except for the criteria described above, George Washington Academy may not impose additional conditions or timelines related to obtaining an IEE at public expense.
4. An IEE conducted at George Washington Academy's expense becomes the property of George Washington Academy, in its entirety.

### **IV.C. PRIOR WRITTEN NOTICE (34 CFR § 300.503; RULES IV.C.)**

1. Prior written notice must be given to the parents of a student with a disability or student who is an adult a reasonable time before George Washington Academy:



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- a. Proposes to initiate or change the identification, evaluation, or educational placement of the student or the provision of a FAPE to the student; or
  - b. Refuses to initiate or change the identification, evaluation, or educational placement of the student or the provision of a FAPE to the student.
2. The notice required must include:
- a. A description of the action proposed or refused by George Washington Academy;
  - b. An explanation of why George Washington Academy proposes or refuses to take the action;
  - c. A description of each evaluation procedure, assessment, record, or report George Washington Academy used as a basis for the proposed or refused action;
  - d. A statement that the parent(s) of a student with a disability or student who is an adult have protection under the procedural safeguards of Part B of the IDEA and, if this notice is not an initial referral for evaluation, the means by which a copy of a description of the procedural safeguards can be obtained;
  - e. Sources for the parent(s) or student who is an adult to contact to obtain assistance in understanding the provisions of Part B of the IDEA;
  - f. A description of other options that the IEP Team considered and the reasons why those options were rejected; and
  - g. A description of other factors that are relevant to George Washington Academy's proposal or refusal.
3. The notice must be:
- a. Written in language understandable to the general public; and
  - b. Provided in the native language of the parent or student who is an adult or other mode of communication used by the parent or student who is an adult, unless it is clearly not feasible to do so.
    - (1) If the native language or other mode of communication of the parent or student who is an adult is not a written language, George Washington Academy must take steps to ensure that:
      - (a) The notice is translated orally or by other means to the parent or student who is an adult in the parent's or student who is an adult native language or other mode of communication;
      - (b) The parent or student who is an adult understands the content of the notice; and
      - (c) There is written evidence that the requirements above have been met.

**IV.D. PROCEDURAL SAFEGUARDS NOTICE (34 CFR § 300.504; RULES IV.D.)**

1. A copy of the procedural safeguards available to the parent(s) of a student with a disability or student who is an adult must be given to the parent(s) or student who is an adult only one time a year, except that a copy also must be given to the parent(s) or student who is an adult:
  - a. Upon initial referral or parent or student who is an adult request for evaluation;
  - b. Upon receipt of the first State complaint or a due process complaint in that school year;
  - c. In accordance with the discipline procedures in 34 CFR § 300.530(h) and Rules V.F.; and
  - d. Upon request by a parent or student who is an adult.
2. George Washington Academy may place a current copy of the procedural safeguards notice on its website if a website exists.
3. The procedural safeguards notice must include a full explanation of all the procedural safeguards relating to:
  - a. Independent educational evaluations;
  - b. Prior written notice;
  - c. Parental or student who is an adult consent;
  - d. Access to educational records;
  - e. The opportunity to present and resolve complaints through the, including:
    - (1) The time period in which to file a due process complaint or State complaint;
    - (2) The opportunity for the agency to resolve the due process hearing complaint or State complaint; and
    - (3) The difference between the due process complaint and the State complaint procedures, including the jurisdiction of each procedure, what issues may be raised, filing and decisional timelines, and relevant procedures;
  - f. The availability of mediation;
  - g. The student's placement during pendency of hearings on due process complaints;
  - h. Procedures for students who are subject to placement in an interim alternative educational setting (IAES);
  - i. Requirements for unilateral placement by parent(s) of students or by a students who is an adult in private schools at public expense;

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- j. Hearings on due process complaints, including requirements for disclosure of evaluation results and recommendations;
  - k. State-level appeals;
  - l. Civil actions, including the time period in which to file those actions; and
  - m. Attorneys' fees.
4. The notice required must be in language understandable to the parent(s) or student who is an adult as set forth in 34 CFR § 300.503(c) and Rules IV.C.3.
  5. A parent of a student with a disability or student who is an adult may elect to receive prior written notice, procedural safeguards notice, and prior written notice following a due process complaint pursuant to Rules IV.H.6 by an electronic mail communication, if George Washington Academy makes that option available (34 CFR § 300.505).

### **IV.E. STATE COMPLAINT PROCEDURES (34 CFR § 300.151–153; RULES IV.E.)**

1. George Washington Academy follows all requirements found in Rules IV.E regarding State complaint procedures.

### **IV.F. MEDIATION (34 CFR § 300.506; RULES IV.F.)**

1. George Washington Academy follows all requirements found in Rules IV.F regarding Mediation.

### **IV.G. FILING A DUE PROCESS COMPLAINT (34 CFR § 300.507; UCA 53E-7-208; RULES IV.G.)**

1. George Washington Academy follows all requirements found in Rules IV.G regarding filing a due process complaint.

### **IV.H. DUE PROCESS COMPLAINT (34 CFR § 300.508; RULES IV.H.)**

1. George Washington Academy follows all requirements found in Rules IV.H regarding due process complaints.

### **IV.I. RESOLUTION PROCESS (34 CFR § 300.510; RULES IV.J.)**

1. George Washington Academy follows all requirements found in Rules IV.J regarding the resolution process.

### **IV.J. IMPARTIAL DUE PROCESS HEARING (34 CFR § 300.511; RULES IV.K.)**

1. George Washington Academy follows all requirements found in Rules IV.K regarding impartial due process hearings.

**IV.K. HEARING RIGHTS (34 CFR § 300.512; RULES IV.L.)**

1. George Washington Academy follows all requirements found in Rules IV.L regarding hearing rights.

**IV.L. HEARING DECISIONS (34 CFR § 300.513; RULES IV.M.)**

1. George Washington Academy follows all requirements found in Rules IV.M regarding hearing decisions.

**IV.M. FINALITY OF DECISION (34 CFR § 300.514; RULES IV.N.)**

1. George Washington Academy follows all requirements found in Rules IV.N regarding finality of decisions.

**IV.N. STATE ENFORCEMENT MECHANISMS (34 CFR § 300.537; RULES IV.O.)**

1. George Washington Academy follows all requirements found in Rules IV.O regarding State enforcement mechanisms.

**IV.O. TIMELINES AND CONVENIENCE OF HEARINGS (34 CFR § 300.515; RULES IV.P.)**

1. George Washington Academy follows all requirements found in Rules IV.P regarding timelines and convenience of hearings.

**IV.P. CIVIL ACTION (34 CFR § 300.516; RULES IV.Q.)**

1. George Washington Academy follows all requirements found in Rules IV.Q regarding civil action.

**IV.Q. ATTORNEY'S FEES (CFR §300.517; UCA 53E-7-208(4)(B); RULES IV.R.)**

1. George Washington Academy follows all requirements found in Rules IV.R regarding attorneys' fees.

**IV.R. STUDENT'S STATUS DURING PROCEEDINGS (34 CFR § 300.518; RULES IV.S.)**

1. George Washington Academy follows all requirements found in Rules IV.S regarding student's status during proceedings.

**IV.S. SURROGATE PARENTS (34 CFR § 300.519; RULES IV.T.)**

1. George Washington Academy must ensure that the rights of a student are protected when:
  - a. No parent (as defined under 34 CFR § 300.30 and Rules I.E.34.) can be identified for a student under the age of majority;

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- b. George Washington Academy after reasonable efforts, cannot locate a parent for a student under the age of majority;
  - c. The student is a ward of the State under the laws of Utah; or
  - d. The student is an unaccompanied youth experiencing homelessness under the age of majority.
2. The duties of George Washington Academy include the assignment of an individual to act as a surrogate for the parent(s) for a student under the age of majority. This must include a method for determining whether a student under the age of majority needs a surrogate parent and for assigning a surrogate parent to the student.
3. In the case of a student who is a ward of the State, the surrogate parent alternatively may be appointed by the judge overseeing the student's case, provided that the surrogate meets the requirements.
4. George Washington Academy may select a surrogate parent in any way permitted under State law.
5. George Washington Academy must ensure that a person selected as a surrogate parent:
  - a. Is not an employee of the USBE, George Washington Academy, or any other agency that is involved in the education or care of the student;
  - b. Has no personal or professional interest that conflicts with the interest of the student that the surrogate parent represents; and
  - c. Has knowledge and skills that ensure adequate representation of the student.
6. A person otherwise qualified to be a surrogate parent is not an employee of George Washington Academy solely because the person is paid by George Washington Academy to serve as a surrogate parent.
7. In the case of a student who is an unaccompanied youth experiencing homelessness, appropriate staff of emergency shelters, transitional shelters, independent living programs, and street outreach programs may be appointed as temporary surrogates until a surrogate can be appointed that meets all of the requirements.
8. The surrogate parent may represent the student in all matters relating to the identification, evaluation, and educational placement of the student, and the provision of a FAPE to the student.
9. The USBE and George Washington Academy must make reasonable efforts to ensure the assignment of a surrogate parent not more than 30 calendar days after George Washington Academy determines that the student needs a surrogate.

**IV.T. TRANSFER OF PARENTAL RIGHTS AT AGE OF MAJORITY (34 CFR § 300.520; RULES IV.U.)**

1. When a student with a disability reaches the age of majority under State law (i.e., age 18) that applies to all students, except for a student with a disability who has been determined to be incompetent under State law, or the student with a disability marries or becomes emancipated:
  - a. George Washington Academy must provide any notice required by Part B of the IDEA to both the individual and the parent(s); and
  - b. All other rights accorded to parents under Part B of the IDEA transfer to the student.;
2. All rights accorded to parents under Part B of the IDEA transfer to students who are incarcerated in an adult or juvenile State or local correctional institution; and
3. Whenever a state transfers rights, George Washington Academy must notify the individual and the parent(s) of the transfer of rights within a reasonable time frame.

**IV.U. CONFIDENTIALITY OF INFORMATION (34 CFR §§ 300.610–300.626; R277-487; RULES IV.V.)**

1. George Washington Academy takes appropriate steps to ensure the protection of the confidentiality of any personally identifiable data, information, and records collected or maintained by George Washington Academy pursuant to Part B of the IDEA and R277-487. George Washington Academy follows all requirements found in Rules IV.V.1-19 regarding confidentiality of information including
2. Definitions as used in Rules (34 CFR § 300.611).
  - a. *Destruction* means physical destruction or removal of personal identifiers from information so that the information is no longer personally identifiable.
  - b. *Education records* means the type of records covered under the definition of “education records” in 34 CFR § 99, implementing regulations for the Family Educational Rights and Privacy Act of 1974, 20 USC § 1232g (FERPA).
  - c. *Participating agency* means any agency or institution that collects, maintains, or uses personally identifiable information, or from which information is obtained, under Part B of the IDEA.
3. Record of access (34 CFR § 300.614).
  - a. George Washington Academy must keep a record of parties obtaining access to education records collected, maintained, or used under Part B of the IDEA and the Rules (except access by parents or student who is an adult and authorized employees

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of George Washington Academy), including the name of the party, the date access was given, and the purpose for which the party is authorized to use the records.

4. Records on more than one student (34 CFR § 300.615).
  - a. If any education record includes information on more than one student, the parent(s) of those students or the student who is an adult have the right to inspect and review only the information relating to their student or themselves or to be informed of that specific information.
5. List of types and locations of information (34 CFR § 300.616).
  - a. On request, George Washington Academy must provide parents or student who is an adult with a list of the types and locations of education records collected, maintained, or used by George Washington Academy.
6. Fees (34 CFR § 300.617).
  - a. George Washington Academy may charge a fee for copies of records that are made for parent(s) or student who is an adult under Part B of the IDEA if the fee does not effectively prevent the parent(s) or student who is an adult from exercising their right to inspect and review those records.
  - b. George Washington Academy may not charge a fee to search for or to retrieve information under Part B of the IDEA.
7. Consent for disclosure of PII (34 CFR § 300.622).
  - a. Except as to disclosures addressed in referral to and action by law enforcement and judicial authorities, for which parental consent is not required by 34 CFR § 99, parental or adult student consent must be obtained before PII is:
    - (1) Disclosed to anyone other than officials of participating agencies collecting or using the information under Part B of the IDEA or the Rules: or
    - (2) Used for any purpose other than meeting a requirement of Part B of the IDEA or the Rules.
  - b. George Washington Academy may not release information from education records to participating agencies without parental or adult student consent unless authorized to do so by 34 CFR §§ 99.31 and 99.34 (FERPA):
    - (1) 34 CFR § 99.31 allows an LEA to disclose PII from the education records of a student without the written consent of the parent(s) of the student or student who is an adult, if the disclosure is:
      - (a) To other school officials, including teachers, within the LEA who have been determined by the LEA to have legitimate educational interests.

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- (b) To officials of another school or school site in which the student seeks or intends to enroll, subject to the requirements set forth in 34 CFR § 99.34 below.
  - (2) 34 CFR § 99.34 requires that an LEA transferring the education records of a student pursuant to 34 CFR § 99.34 above shall make a reasonable attempt to notify the parent of the student or student who is an adult of the transfer of records at the last known address of the parent or student who is an adult, except that the LEA does not have to provide any further notice of the transfer of records when:
    - (a) The transfer is initiated by the parent(s) or student who is an adult at the sending LEA.
    - (b) The LEA includes in its annual notice of procedural safeguards, that it is the policy of the LEA to forward education records on request to a school in which a student seeks or intends to enroll.
    - (c) The LEA transferring the records must keep a copy of the records for three years after the transfer.
  - c. George Washington Academy, upon receiving PII from another educational agency or institution may make further disclosure of the information on behalf of the LEA without the prior written consent of the parent(s) or student who is an adult if the conditions of 34 CFR §§ 99.31 and 99.34 noted above are met, and if the educational agency informs the party to whom disclosure is made of these requirements.
  - d. If the parent(s) or student who is an adult refuses consent for the release of PII to a third party, then that party may proceed with statutory procedures in an effort to obtain the desired information.
  - e. Note: As authorized in 34 CFR § 99.31 (FERPA), George Washington Academy includes in the annual procedural safeguards notice that it is their policy to forward educational records of a student with disabilities without parental or student who is an adult consent or notice to officials of another school or school district in which a student seeks or intends to enroll.
8. Safeguards (34 CFR § 300.623).
- a. George Washington Academy must protect the confidentiality of PII at collection, storage, disclosure, and destruction stages.
  - b. One official at George Washington Academy must assume responsibility for ensuring the confidentiality of any PII.
  - c. All persons collecting or using PII must receive training or instruction regarding the State's policies and procedures in this section and 34 CFR § 99.



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- d. George Washington Academy must maintain, for public inspection, a current listing of the names and positions of those employees within the LEA who may have access to PII on students with disabilities.
9. Destruction of information (34 CFR § 300.624).
    - a. George Washington Academy must inform parents or student who is an adult when PII collected, maintained, or used under Part B of the IDEA and the Rules is no longer needed to provide educational services to the student.
    - b. The information no longer needed must be destroyed at the request of the parent(s) or student who is an adult. However, a permanent record of a student's name, address, phone number, the student's grades, attendance record, classes attended, grade level completed, and year completed may be maintained without time limitation.
    - c. Each student's records may be considered "no longer needed to provide educational services" and may be destroyed three years after the student graduates or three years after the student turns 22 under IDEA. Medicaid requires that records be maintained for at least five years after the provision of services.

## **V. DISCIPLINE PROCEDURES (34 CFR § 300.530)**

### **V.A. DISCIPLINE PROCEDURES FOR STUDENTS WITH DISABILITIES (RULES V.A.)**

1. Consistent with the requirements of Part B of the IDEA and the Rules, George Washington Academy shall establish, maintain, and implement policies and procedures for disciplining students with disabilities.

### **V.B. AUTHORITY OF SCHOOL PERSONNEL (34 CFR § 300.530(A–C); RULES V.B.)**

1. School personnel may consider any unique circumstances on a case-by-case basis when determining whether a change in placement, consistent with the other requirements of this section, is appropriate for a student with a disability who violates a code of student conduct.
2. School personnel may remove a student with a disability who violates a code of student conduct from the student's current placement to an appropriate interim alternative educational setting (IAES), another setting, or suspension, for not more than ten consecutive school days (to the same extent those alternatives are applied to students without disabilities), and for additional removals of not more than ten consecutive school days in that same school year for separate incidents of misconduct, (as long as those removals do not constitute a change of placement because of disciplinary removal as set forth in 34 CFR § 300.536 and Rules V.D.).
3. After a student with a disability has been removed from the student's current placement for ten school days in the same school year, during any subsequent days of removal George Washington Academy must provide services to the extent required under 34 CFR § 300.530(d) and Rules V.C.
4. For disciplinary changes in placement that would exceed ten consecutive school days, if the behavior that gave rise to the violation of the school code is determined not to be a manifestation of the student's disability, school personnel may apply the relevant disciplinary procedures to students with disabilities in the same manner and for the same duration as the procedures would be applied to students without disabilities, except after the tenth day of removal that constitutes a change in placement, George Washington Academy must provide services to the student as outlined in Rule V.C.

### **V.C. SERVICES (34 CFR § 300.530(D); RULES V.C.)**

1. A student with a disability who is removed from the student's current placement must:
  - a. Continue to receive educational services so as to enable the student to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the student's IEP; and
  - b. Receive, as appropriate, an FBA, and behavior intervention services and modifications that are designed to address the behavior violation so that it does not recur.

2. The services may be provided in an IAES.
3. George Washington Academy is only required to provide services during periods of removal to a student with a disability who has been removed from the student's current placement for ten school days or less in that school year if it also provides services to a student without disabilities who is similarly removed.
4. After a student with a disability has been removed from the student's current placement for ten school days in the same school year, if the current removal is for not more than ten consecutive school days and is not a change of placement under 34 CFR § 300.536 and Rules V.D., school personnel, in consultation with at least one of the student's teachers, determine the extent to which services are needed, so as to enable the student to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the student's IEP.
5. If the removal is a change of placement, the student's IEP Team determines appropriate services to be provided during the removal.

**V.D. CHANGE OF PLACEMENT DUE TO DISCIPLINARY REMOVALS (34 CFR § 300.536; RULES V.D.)**

1. For purposes of removals 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 consecutive school days, including shortened school days; or
  - b. The student has been subjected to a series of removals that constitute a pattern, including shortened school days:
    - (1) Because the series of removals total more than ten school days in a school year;
    - (2) Because the student's behavior is substantially similar to the student's behavior in previous incidents that resulted in the series of removals; and
    - (3) Because of such additional factors as the length of each removal, the total amount of time the student has been removed, and the proximity of the removals to one another.
2. As used in the Rules, shortened school days occur when a student's school day is reduced solely by school personnel in response to the student's behavior for disciplinary purposes, rather than the student's IEP team or placement team for that student to receive a FAPE.
  - a. In general, the use of informal removals to address a student's behavior, if implemented repeatedly throughout the school year, could constitute a disciplinary removal from the current placement. Therefore, the discipline procedures in 34 C.F.R. §§ 300.530 through 300.536 and Rules V. would generally apply unless all three of the following factors are met:

- (1) The student is afforded the opportunity to continue to appropriately participate in the general curriculum;
  - (2) The student continues to receive the services specified on the student's IEP; and
  - (3) The student continues to participate with nondisabled children to the extent they would have in their current placement. 71 Fed. Reg. 46715 (Aug. 14, 2006).
3. George Washington Academy determines on a case-by-case basis whether a pattern of removals constitutes a change of placement. This determination is subject to review through due process and judicial proceedings.

**V.E. MANIFESTATION OF DETERMINATION (34 CFR § 300.530(E–G, I); RULES V.E.)**

1. Within ten school days of any decision to change the placement of a student with a disability because of a violation of a code of student conduct, the LEA, the parent or adult student, and relevant members of the student's IEP Team (as determined by the parent or student who is an adult and the LEA) must review all relevant information in the student's file, including the student's IEP, any teacher observations, and any relevant information provided by the parent(s) or adult student to determine:
  - a. If the conduct in question was caused by, or had a direct and substantial relationship to, the student's disability; or
  - b. If the conduct in question was the direct result of George Washington Academy's failure to implement the IEP.
2. The conduct must be determined to be a manifestation of the student's disability if the LEA, the parent or student who is an adult, and relevant members of the student's IEP Team determine that:
  - a. The misconduct was caused by or had a direct and substantial relationship to the student's disability; or
  - b. The misconduct was the direct result of George Washington Academy's failure to implement the IEP.
3. If the LEA, the parent or student who is an adult, and relevant members of the student's IEP Team determine that the misconduct was the direct result of the George Washington Academy's failure to implement the IEP, George Washington Academy must take immediate steps to remedy those deficiencies.
4. If the LEA, the parent(s) or student who is an adult, and relevant members of the IEP Team make the determination that the conduct was a manifestation of the student's disability, the IEP Team must:
  - a. Either:

- (1) Conduct a functional behavior assessment (FBA), unless George Washington Academy had conducted a FBA before the behavior that resulted in the change of placement occurred, and implement a BIP for the student; or
    - (2) If a BIP has already been developed, review the BIP, and modify it, as necessary, to address the behavior;
  - b. And, unless the misconduct falls under the definition of special circumstances in Rules V.E.5., return the student to the placement from which the student was removed, unless the parent or adult student and the LEA agree to a change of placement as part of the modification of the BIP.
5. Special circumstances.
- a. School personnel may remove a student to an IAES for not more than 45 school days without regard to whether the behavior is determined to be a manifestation of the student's disability, if the student:
    - (1) Carries a weapon to or possesses a weapon at school, on school premises, or to or at a school function under the jurisdiction of the George Washington Academy;
    - (2) Knowingly possesses or uses illegal drugs, or sells or solicits the sale of a controlled substance, while at school, on school premises, or at a school function under the jurisdiction George Washington Academy;
    - (3) Has inflicted serious bodily injury upon another person while at school, on school premises, or at a school function under the jurisdiction of George Washington Academy.
  - b. Definitions.
    - (1) For purposes of this section, the following definitions apply:
      - (a) *Controlled substance* means a drug or other substance that cannot be distributed without a prescription, identified under schedules I, II, III, IV, or V in section 202(c) of the Controlled Substances Act (21 USC § 812(c)).
      - (b) *Illegal drug* means a controlled substance but does not include a drug controlled, possessed, or used under the supervision of a licensed health-care professional or one legally possessed or used under the Controlled Substances Act or under any other provision of Federal law (21 USC § 812).
      - (c) *Serious bodily injury* means bodily injury that involves a substantial risk of death, extreme physical pain, protracted and obvious disfigurement, or protracted loss or impairment of the function of a bodily member, organ, or mental faculty (18 USC § 1365). Serious bodily injury does not include a cut, abrasion, bruise, burn, disfigurement, physical pain, illness, or

impairment of the function of a bodily member, organ or mental faculty that is temporary (18 USC § 1365).

- (d) *Weapon* means a weapon, device, instrument, material, or substance, animate or inanimate, that is used for or is readily capable of, causing death or serious bodily injury, except that such term does not include a pocket knife with a blade of less than 2.5 inches (18 USC § 930).

**V.F. PROCEDURAL SAFEGUARDS NOTICE (34 CFR § 300.530(H); RULES V.F.)**

1. On the date on which the decision is made to make a removal that constitutes a change of placement of a student with a disability because of a violation of a code of student conduct, George Washington Academy must notify the parent(s) or student who is an adult of that decision and provide the parent(s) or student who is an adult the procedural safeguards notice.

**V.G. DETERMINATION OF SETTING (34 CFR § 300.531; RULES V.G.)**

1. The student's IEP Team determines the IAES for services if the behavior that gives rise to the removal is not a manifestation of the student's disability, the removal constitutes a change of placement, or the behavior falls under the special circumstances in Rules V.E.5.

**V.H. APPEALS BY PARENT OR LEA (34 CFR § 300.532; RULES V.H.)**

1. The parent(s) of a student with a disability or student who is an adult who disagrees with any decision regarding placement or the manifestation determination, or if George Washington Academy believes that maintaining the current placement of the student is substantially likely to result in injury to the student or others, may appeal the decision by filing a due process hearing complaint and requesting a hearing.
2. Authority of hearing officer.
  - a. A due process hearing officer hears and makes a determination regarding an appeal under Rules V.H.1.
  - b. In making the determination, the hearing officer may:
    - (1) Return the student with a disability to the placement from which the student was removed if the hearing officer determines that the removal was a violation of the discipline procedures under Part B of the IDEA or the Rules or that the student's behavior was a manifestation of the student's disability; or
    - (2) Order a change of placement of the student with a disability to an appropriate IAES for not more than 45 school days if the hearing officer determines that maintaining the current placement of the student is substantially likely to result in injury to the student or to others.

- c. The appeal procedures may be repeated if George Washington Academy believes that returning the student to the original placement is substantially likely to result in injury to the student or to others.
3. Expedited due process hearing.
    - a. Whenever a hearing is requested, the parent(s) or student who is an adult or George Washington Academy in the dispute must have an opportunity for an impartial due process hearing.
    - b. George Washington Academy is responsible for arranging the expedited due process hearing with the State Director of Special Education, which must occur within 20 school days of the date the complaint requesting the hearing is filed. The hearing officer must make a determination within ten school days after the hearing.
    - c. Unless the parent(s) or student who is an adult and George Washington Academy agree in writing to waive the resolution meeting, or agree to use mediation:
      - (1) A resolution meeting must occur within seven calendar days of receiving notice of the due process complaint; and
      - (2) The due process hearing may proceed unless the matter has been resolved to the satisfaction of both parties within 15 calendar days of the receipt of the due process complaint.
    - d. Parties may not mutually agree to extend the resolution period to resolve an expedited due process complaint. Therefore, when the parties have participated in a resolution meeting or engaged in mediation and the dispute has not been resolved to the satisfaction of both parties within 15 days of the receipt of the due process complaint, the expedited due process hearing may proceed.
    - e. A hearing officer may not extend the timeline for making a determination in an expedited due process hearing.
    - f. The decisions on expedited due process hearings are final, unless meeting the requirements of 34 CFR § 300.514(b) or 34 CFR § 300.516.6.

#### **V.I. PLACEMENT DURING APPEALS (34 CFR § 300.533; RULES V.I)**

1. When an appeal through a due process complaint has been made by either the parent or student who is an adult or George Washington Academy, the student must remain in the IAES pending the decision of the hearing officer or until the expiration of the time period specified, whichever occurs first, unless the parent(s) or adult student and George Washington Academy (or USBE if appropriate) agree otherwise.

**V.J. PROTECTIONS FOR STUDENTS NOT DETERMINED ELIGIBLE FOR SPECIAL EDUCATION AND RELATED SERVICES (34 CFR § 300.534; RULES V.J.)**

1. A student who has not been determined to be eligible for special education and related services under Part B of the IDEA, and who has engaged in behavior that violated a code of student conduct, may assert any of the protections provided for in this part if George Washington Academy had knowledge that the student was a student with a disability before the behavior that precipitated the disciplinary action occurred.
2. George Washington Academy must be deemed to have knowledge that a student is a student with a disability if, before the behavior that precipitated the disciplinary action occurred:
  - a. The parent(s) of the student or student who is an adult expressed concern in writing to supervisory or administrative personnel of George Washington Academy, or a teacher of the student, that the student is in need of special education and related services;
  - b. The parent(s) of the student or student who is an adult requested an evaluation of the student pursuant to 34 CFR §§ 300.300 through 300.311; or
  - c. The teacher of the student, or other personnel of George Washington Academy, expressed specific concerns about a pattern of behavior demonstrated by the student directly to the director of special education of George Washington Academy or to other supervisory personnel of George Washington Academy.
3. George Washington Academy would not be deemed to have knowledge that a student is a student with a disability if:
  - a. The parent(s) of the student or the student who is an adult:
    - (1) Has not allowed an evaluation of the student pursuant to 34 CFR §§ 300.300 through 300.311; or
    - (2) Has refused services under this part; or
  - b. The student has been evaluated in accordance with 34 CFR §§ 300.300 through 300.311 and determined to not be a student with a disability under Part B of the IDEA.
4. If George Washington Academy does not have knowledge that a student is a student with a disability prior to taking disciplinary measures against the student, the student may be subjected to the disciplinary measures applied to students without disabilities who engage in comparable behaviors.
  - a. If a request is made for an evaluation of a student during the time period in which the student is subjected to disciplinary measures, the evaluation must be conducted in an expedited manner.



- (1) Until the evaluation is completed, the student remains in the educational placement determined by school authorities, which can include suspension or expulsion without educational services.
- (2) If the student is determined to be a student with a disability, taking into consideration information from the evaluation conducted by George Washington Academy and information provided by the parent(s) or adult student, George Washington Academy must provide special education and related services.

**V.K. REFERRAL TO AND ACTION BY LAW ENFORCEMENT AND JUDICIAL AUTHORITIES (34 CFR § 300.535; RULES V.K.)**

1. Nothing in Part B of the IDEA prohibits George Washington Academy from reporting a crime committed by a student with a disability to appropriate authorities or prevents State law enforcement and judicial authorities from exercising their responsibilities with regard to the application of Federal and State law to crimes committed by a student with a disability.
2. Transmittal of records.
  - a. If George Washington Academy reports a crime committed by a student with a disability, it must ensure that copies of the special education and disciplinary records of the student are transmitted for consideration by the appropriate authorities to whom George Washington Academy reports the crime.
  - b. If George Washington Academy reports a crime under this section, it may transmit copies of the student's special education and disciplinary records only to the extent that the transmission is permitted by FERPA.

## **VI. STUDENTS WITH DISABILITIES IN OTHER SETTINGS**

### **VI.A. PRIVATE SCHOOL PLACEMENTS BY LEAS (34 CFR § 300.325; RULES VI.A.)**

1. George Washington Academy follows all requirements found in Rules VI.A regarding private school placements.

### **VI.B. STUDENTS WITH DISABILITIES ENROLLED BY THEIR PARENT(S) IN PRIVATE SCHOOLS WHEN FAPE IS NOT AT ISSUE (UNILATERAL PLACEMENT) (34 CFR § 300.130; RULES VI.B.)**

1. George Washington Academy follows all requirements found in Rules VI.B regarding students with disabilities enrolled by their parent(s) in private schools when FAPE is not at issue (unilateral placement).

### **VI.C. STUDENTS WITH DISABILITIES ENROLLED BY THEIR PARENT(S) IN PRIVATE SCHOOLS WHEN FAPE IS AT ISSUE (34 CFR § 300.148; RULES VI.C.)**

1. George Washington Academy follows all requirements found in Rules VI.C regarding students with disabilities enrolled by their parent(s) in private schools when FAPE is at issue.

### **VI.D. STUDENTS WITH DISABILITIES ENROLLED IN HOME SCHOOL (RULES IV.D.)**

1. Dual enrollment (R277-438 and UCA 53G-6-702).
  - a. A student with a disability who is simultaneously enrolled in both home school or private school and a public school is considered a student in dual enrollment.
  - b. A student with a disability seeking dual enrollment is entitled to special education and related services, under an IEP, for the time, or for the number of courses, the student is enrolled in the public school, based on the decision of the student's IEP Team. The IEP Team must consider the amount of time and courses needed for the provision of FAPE.

### **VI.E. STUDENTS WITH DISABILITIES ENROLLED IN ADULT EDUCATION (R277-733; UCA 53E-10-205; RULES VI.E.)**

1. Students with disabilities enrolled in Adult Education remain entitled to special education and related services until determined no longer meeting eligibility criteria, graduate with a regular high school diploma, or reach maximum age (i.e., age 22).
2. The responsibility for FAPE for students with disabilities enrolled in Adult Education classes remains with the school district of residence.

**VI.F. STUDENTS WITH DISABILITIES ENROLLED IN VIRTUAL SETTINGS (RULES VI.F.)**

1. Students with disabilities enrolled in public education virtual settings remain entitled to special education and related services until determined no longer meeting eligibility criteria, graduate with a regular high school diploma, or reach maximum age.
2. The responsibility for FAPE for students with disabilities enrolled in public education virtual settings remains with the LEA of enrollment, unless Board Rule specifies otherwise.

**VI.G. STUDENTS WITH DISABILITIES CONVICTED AS ADULTS AND INCARCERATED IN ADULT PRISONS (34 CFR § 300.324; RULES VI.J.)**

1. George Washington Academy follows all requirements found in Rules VI.J regarding students with disabilities convicted as adults and incarcerated in adult prisons.

**VI.H. STUDENTS WITH DISABILITIES WHO ARE ALSO IN STATE CUSTODY/CARE (R277-709; UCA 62A-4A-701; RULES VI.K.)**

1. George Washington Academy follows all requirements found in Rules VI.K regarding students with disabilities who are also in state custody/care.

**VI.I. STUDENTS WITH DISABILITIES WHO RESIDE IN NURSING HOMES (RULES VI.L.)**

1. George Washington Academy follows all requirements found in Rules VI.L regarding students with disabilities who reside in nursing homes. Students with disabilities residing in nursing homes and their parent(s) or students who is an adult have the same rights under IDEA as all other students who are IDEA-eligible students with disabilities.

## VII. POSTSECONDARY TRANSITIONS

### VII.A. POSTSECONDARY TRANSITION SERVICES—SCHOOL TO POST-SCHOOL (RULES VII.B.)

1. Purpose (34 CFR § 300.1; Rules VII.B.1).
  - a. To ensure that all students with disabilities have available to them a FAPE that emphasizes special education and related services designed to meet their unique needs and prepare them for further education, employment, and independent living.
2. Definition (34 CFR § 300.43; Rules VII.B.2).
  - a. *Postsecondary Transition services* means a coordinated set of activities for a student with a disability that:
    - (1) Is designed to be within a results-oriented process that is focused on improving the academic and functional achievement of the student with a disability, to facilitate the student’s movement from school to post-school activities, including postsecondary education, vocational education, competitive integrated employment (including supported employment), continuing and adult education, adult services, independent living, or full community participation;
    - (2) Is based on the individual student’s needs, taking into account the student’s strengths, preferences, and interests, and includes:
      - (a) Instruction;
      - (b) Related services;
      - (c) Community experiences;
      - (d) The development of employment and other post-school adult living objectives; and
      - (e) If appropriate, acquisition of daily living skills and provision of a functional vocational evaluation.
  - b. Postsecondary Transition services for students with disabilities may be special education, if provided as specially designed instruction, or a related service, if required to assist a student with a disability to benefit from special education.
3. Parent or student who is an adult participation (34 CFR § 300.322; Rules VII.B.3).
  - a. For a student with a disability age 14 and older, or younger if determined appropriate by the IEP Team, the notice of meeting must indicate:
    - (1) That a purpose of the meeting will be the consideration of the postsecondary goals and postsecondary transition services for the student;

- (2) That the LEA will invite the student; and
  - (3) Identify any other agency that will be invited, with the consent of the parent(s) or student who is an adult, to send a representative.
4. IEP Team (34 CFR § 300.321; Rules VII.B.4).
- a. For an IEP Team meeting that includes as a purpose the development of a postsecondary transition plan:
    - (1) George Washington Academy must invite the student with a disability to attend the student’s IEP meeting if a purpose of the meeting will be the consideration of the postsecondary goals for the student and the postsecondary transition services needed to assist the student in reaching those goals.
    - (2) If the student does not attend the IEP meeting, George Washington Academy must take other steps to ensure that the student’s preferences and interests are considered.
    - (3) To the extent appropriate, with the consent of the parent(s) or adult student, George Washington Academy must invite a representative of any participating agency that is likely to be responsible for providing or may be paying for postsecondary transition services.
5. Definition of IEP (34 CFR § 300.320(b); Rules VII.B.5).
- a. For a student with a disability, ages 14 and older, an annual IEP goal related to the student’s postsecondary transition service needs.
  - b. Postsecondary transition services. For a student with a disability, ages 14 and older, or younger if determined appropriate by the IEP Team, and updated annually thereafter, the IEP must include:
    - (1) Realistic and reasonable measurable postsecondary goals based upon annual age-appropriate postsecondary transition assessments related to training or education, employment, and, where appropriate, independent living skills;
    - (2) Postsecondary transition services (e.g., activities, experiences, specially designed instruction), that will reasonably enable the student to reach the postsecondary goals identified on the IEP;
    - (3) Multi-year courses of study that will reasonably enable the student to reach the postsecondary goals identified on the IEP;
    - (4) Evidence that the student was invited to the IEP Team meeting where transition services are to be discussed. If the student does not attend the IEP meeting, the IEP Team must take other steps to ensure the student’s preferences and interests are considered;

- (5) If appropriate, evidence that a representative of any participating agency that might be providing or paying for any postsecondary transition services was invited to the IEP Team meeting with written consent of the parent or adult student prior to the meeting; and
  - (6) Any modifications to graduation requirements, as permitted under R277-700.
- c. Students with disabilities must have access to all school services related to college and career readiness planning and must be actively invited and included in school activities which address course planning (including online courses), graduation, and postsecondary education and employment (i.e., college week, scholarship opportunities, ACT, and concurrent enrollment) (R277-462).
6. Transfer of rights at age of majority (34 CFR §§ 300.320(c), 300.520; Rules VII.B.6).
- a. Not later than the student's 17th birthday, the IEP must include a dated statement, signed by the student, parent, and an LEA Representative, that the student and the student's parent(s) have been informed of parent's rights under Part B of the IDEA (i.e. Procedural Safeguards) that will transfer to the student on reaching the age of majority (i.e., age 18), except for a student with a disability who has been determined to be incompetent by a court.
  - b. All rights accorded to parents under Part B of the IDEA transfer to the student on the student's 18th birthday unless the IEP Team determines that:
    - (1) The parent has obtained legal guardianship, power of attorney, or conservatorship; or
    - (2) The student has married or become emancipated (in which case the rights transfer at that time).
  - c. All rights accorded to parents under Part B of the IDEA transfer to students who are incarcerated in an adult or juvenile State or local correctional institution.
  - d. When a student with a disability reaches the age of majority under State law (i.e., age 18) that applies to all students, except for a student with a disability who has been determined to be incompetent under State law, or the student with a disability marries or becomes emancipated:
    - (1) George Washington Academy must provide any notice required by Part B of the IDEA to both the individual and the parent(s); and
    - (2) All other rights accorded to parents under Part B of the IDEA transfer to the student;
    - (3) All rights accorded to parents under Part B of the IDEA transfer to students who are incarcerated in an adult or juvenile State or local correctional institution; and

- e. Whenever a state transfers rights, George Washington Academy must notify the individual and the parent(s) of the transfer of rights within a reasonable time frame.
7. Termination of eligibility as a change of placement (34 CFR § 300.305; Rules VII.B.7).
- a. An evaluation is not required before the termination of a student's eligibility under this part due to graduation from secondary school with a regular high school diploma, or due to exceeding the age of eligibility for FAPE under Utah law.
  - b. For a student whose eligibility terminates due to graduation from secondary school with a regular diploma, or due to exceeding the age of eligibility for FAPE under Utah law, George Washington Academy must provide the student with a summary of the student's academic achievement and functional performance which shall include a statement of the student's postsecondary goals, recommendations on how to assist the student in meeting the student's postsecondary goals, and a statement of when and how accommodations were used for instruction and assessment.
    - (1) George Washington Academy develops the summary of student's academic achievement and functional performance with the IEP Team and additional individuals as appropriate (e.g., school counselors, CTE teachers, Pre-Employment Transition Service representatives).
  - c. Receipt of a general educational development (GED) credential does not end eligibility for FAPE.
8. Failure to meet postsecondary transition objectives (34 CFR § 300.324; Rules VII.B.8)
- a. If a participating agency, other than George Washington Academy, fails to provide the postsecondary transition services described in the IEP, George Washington Academy must reconvene the IEP Team to identify alternative strategies to meet the postsecondary transition objectives for the student set out in the IEP.
  - b. Nothing relieves any participating agency, including a State vocational rehabilitation agency, of the responsibility to provide or pay for any postsecondary transition service that the agency would otherwise provide to students with disabilities who meet the eligibility criteria of that LEA (34 CFR § 300.324).
  - c. If any public agency other than an educational agency is otherwise obligated under Federal or State law, or assigned responsibility under State policy or an interagency agreement, to provide or pay for any services that are also considered special education or related services such as, but not limited to, services relating to assistive technology devices, assistive technology services, related services, supplementary aids and services, and postsecondary transition services, that are necessary for ensuring a FAPE to students with disabilities within the State, the public agency must fulfill that obligation or responsibility, either directly or through contract or other arrangement or as provided in an interagency agreement.
9. Students with disabilities in adult prisons (34 CFR § 300.324; Rules VII.B.9).

- a. The requirements relating to postsecondary transition planning and postsecondary transition services do not apply with respect to those students whose eligibility under Part B of the IDEA will end, because of their age, before they will be eligible to be released from prison based on consideration of their sentence and eligibility for early release.
- b. The obligation to make FAPE available to all students with disabilities does not apply with respect to students ages 18 through 21 to the extent that State law does not require that special education and related services under Part B of the IDEA be provided to students with disabilities who, in the last educational placement prior to their incarceration in an adult correctional facility (34 CFR § 300.102):
  - (1) Were not actually identified as being a student with a disability; and
  - (2) Did not have an IEP under Part B of the IDEA.
- c. The exception does not apply to students with disabilities ages 18 through 21 who:
  - (1) Had been identified as a student with a disability and had received services in accordance with an IEP, but who left school prior to their incarceration; or
  - (2) Did not have an IEP in their last educational setting, but who had actually been identified as a student with a disability.

**VII.B. GRADUATION (UCA 53E-7-202; R277-705; RULES VII.C.)**

1. The obligation of George Washington Academy to make FAPE available to all students with disabilities does not apply to students with disabilities who have graduated from high school with a regular high school diploma (34 CFR §300.102(a)(3)(i)).
  - a. The exception in the Rules VII.C.1 does not apply to students that have graduated from high school but have not been awarded a regular high school diploma (34 CFR § 300.102(a)(3)(ii)).
  - b. George Washington Academy may not withhold a regular high school diploma from a student who has met State or LEA graduation requirements.
  - c. Graduation from high school with a regular high school diploma constitutes a change in placement, requiring prior written notice that must contain all the requirements in the Rules IV.D, including being given a reasonable time before the LEA proposed to terminate the student's eligibility under the IDEA by issuing the student a diploma (34 CFR § 300.503).
  - d. The term "regular high school diploma" does not include an alternative degree that is not fully aligned with the State's academic standards, such as a certificate or a GED (34 CFR § 300.102(a)(3)(iv)).
2. A student with a disability served by a special education program shall satisfy high school completion or graduation criteria, consistent with State and federal law and the student's



IEP. George Washington Academy may modify graduation requirements consistent with the student's IEP (R277-700-6(25)). George Washington Academy may award a student a certificate of completion consistent with state and federal law and the student's IEP.

3. The IEP Team must refer to the USBE Special Education Graduation Guidelines for additional information regarding modifying graduation requirements and IEP substitutions.

**VII.C. TERMINATION OF SERVICES UPON REACHING AGE 22 (UCA 53E-7-201; R277-419-2(23)(B); RULES VII.D.)**

1. If a student with a disability turns 22 any time after July 1, George Washington Academy must continue to provide FAPE until the end of that school year.

## **VIII. RESPONSIBILITIES OF THE UTAH STATE BOARD OF EDUCATION**

### **VIII.A. GENERAL SUPERVISORY AUTHORITY (RULES VIII.A.)**

1. In addition to the requirements listed below, George Washington Academy provides data as required for State and Federal reports and other State functions as listed in Rules VIII.
2. LEA special education program funding (Rules VIII.A.3)
  - a. George Washington Academy shall provide, either singly or in cooperation with other school districts or public institutions, a FAPE for all students with disabilities who are residents of the district or enrolled in a public charter school. The program shall include necessary special facilities, instruction, and education-related services. The costs of George Washington Academy's program, or share of a joint program, shall be paid from LEA funds.
  - b. George Washington Academy shall receive funds under UCA 53F-2-1, State Funding-Minimum School Program (MSP), and other applicable laws to provide special education services in accordance with the Rules.
  - c. George Washington Academy may, singly or in cooperation with other public entities, provide education and training for persons with disabilities who are younger than 3 or older than 22. The cost of such a program may be paid from fees, contributions, and other funds received by LEA for support of the program but may not be paid from public education funds.
  - d. The requirements of Part B of the IDEA and the Rules are binding on each LEA and other public agency that has direct or delegated authority to provide special education and related services in the State of Utah.

### **VIII.B. STATE ELIGIBILITY (RULES VIII.B.)**

1. Program options (34 CFR § 300.110; Rules VIII.B.3)
  - a. George Washington Academy takes steps to ensure that its students with disabilities have available to them the variety of educational programs and services available to students who are nondisabled in the area served by the agency, including art, music, industrial arts, consumer and homemaking education, and vocational education.

### **VIII.C. USBE PROGRAM MONITORING (RULES VIII.D.2-3.)**

1. George Washington Academy is involved in the UPIPS monitoring system, as required under Part B of the IDEA, R277-709, and R277-114-3.

- a. George Washington Academy shall complete the required activities according to the timeline provided by the USBE staff.
2. Results of the monitoring process are publicly available, upon request.t.

**VIII.D. PERSONNEL QUALIFICATIONS (34 CFR § 300.156; RULES VIII.K.3-5.)**

1. Qualifications for special education teachers (34 CFR § 300.156; R277-301).
  - a. The USBE and IDEA established qualifications for each person employed as a public school special education teacher in the State who teaches in an elementary school, middle school, or secondary school.
  - b. The qualifications established by USBE and IDEA ensure that each person employed as a public school special education teacher in the State who teaches in an elementary school, middle school, or secondary school—
    - (1) Has obtained full State certification as a special education teacher (including certification obtained through an alternate route to certification as a special educator, if such alternate route meets minimum requirements described in 34 CFR 200.56(a)(2)(ii)), or passed the State special education teacher licensing examination, and holds a license to teach in the State as a special education teacher;
    - (2) Has not had special education certification or licensure requirements waived on an emergency, temporary, or provisional basis; and
    - (3) Holds at least a bachelor's degree.
  - c. A teacher will be considered to meet the standard of this section if that teacher is participating in an alternate route to special education certification program under which:
    - (1) The teacher:
      - (a) Receives high-quality professional development that is sustained, intensive, and classroom-focused in order to have a positive and lasting impact on classroom instruction, before and while teaching;
      - (b) Participates in a program of intensive supervision that consists of structured guidance and regular ongoing support for teachers or a teacher mentoring program;
      - (c) Assumes functions as a teacher only for a specified period of time not to exceed three years; and
      - (d) Demonstrates satisfactory progress toward full certification as prescribed by the State; and

- (2) The State ensures, through its certification and licensure process, that the provisions of this section are met.
  - d. An adapted physical education endorsement, attached to a general or special education license, is requirement for educators to teach adapted physical education.
2. Related services personnel and paraeducators (R277-301, R277-306, and R277-324).
  - a. The qualifications include qualifications for related services personnel and paraeducators that:
    - (1) Are consistent with any State-approved or State-recognized certification, licensing, registration, or other comparable requirements that apply to the professional discipline in which those personnel are providing special education or related services; and
    - (2) Ensure that related services personnel who deliver services in their discipline or profession:
      - (a) Meet the requirements; and
      - (b) Have not had certification or licensure requirements waived on an emergency, temporary, or provisional basis; and
    - (3) Allow paraeducators and assistants who are appropriately trained and supervised, in accordance with State law, regulation, or written policy, in meeting the requirements of this part, to be used to assist in the provision of special education and related services under Part B of the IDEA to students with disabilities.
    - (4) Interpreters for the Deaf.
      - (a) Under UCA 35A-13-604, an individual is required to be certified as an interpreter if that individual provides interpreter services for students who are deaf and hard of hearing.
3. Notwithstanding any other individual right of action that a parent, student who is an adult, or student may maintain under this part, nothing in this part shall be construed to create a right of action on behalf of an individual student or a class of students for the failure of the USBE or George Washington Academy, or other public agency employee to be highly qualified, or to prevent a parent or adult student from filing a State complaint or due process complaint about staff qualifications with the State Director of Special Education.

**VIII.E. REPORTING ON SUSPENSION AND EXPULSION RATES (34 CFR § 300.170; RULES VIII.M.)**

1. Through daily uploads, George Washington Academy shall report to the USBE staff, through the UTREx reporting system, on the rates of long-term suspensions and expulsions of students with disabilities and students who are nondisabled, including data disaggregated

by race and ethnicity. The USBE staff shall examine these data to determine if significant discrepancies are occurring:

- a. Between students who are nondisabled and students with disabilities within George Washington Academy.
2. If discrepancies are occurring, the USBE staff shall review and, if appropriate, require revisions in both USBE and LEA policies, procedures, and practices to ensure compliance with Part B of the IDEA.
3. Policies, procedures, and practices to be reviewed and, if appropriate, revised, include:
  - a. The development and implementation of IEPs;
  - b. The use of positive behavior interventions and supports; and
  - c. Procedural safeguards.

**VIII.F. PROHIBITION ON MANDATORY MEDICATION (34 CFR § 300.174; RULES VIII.X.)**

1. The USBE prohibits State and George Washington Academy personnel from requiring parents or student who is an adult to obtain a prescription for substances identified under schedules I, II, III, IV, or V in section 202(c) of the Controlled Substances Act for a student as a condition of attending school, receiving an evaluation, or receiving services under Part B of the IDEA (21 USC § 812(c)).
2. Nothing in Rules VIII.X.1. shall be construed to create a Federal prohibition against teachers and other school personnel consulting or sharing classroom- based observations with parent(s) or student who is an adult regarding a student's academic and functional performance, or behavior in the classroom or school, or regarding the need for evaluation for special education or related services related to child find.

## IX. LEA ELIGIBILITY AND RESPONSIBILITIES

### IX.A. LEA ELIGIBILITY FOR IDEA PART B FUNDS (34 CFR §§ 300.211–212, 220; RULES IX.A.)

1. Federal special education funding is made available through a grant to the state from the OSEP. These funds are restricted and may only be used to provide services and program for students who qualify under Part B of the IDEA. Funds are available for students who are 3–5 (section 619 Preschool) and for students age 3–21 (section 611 School-Age). Some funds are retained at the state level for administration and for state level activities. The remaining funds are distributed to Utah Local Education Agencies (LEAs) by formula.
2. Annually, the USBE staff shall notify George Washington Academy of the availability of Federal funds under Part B of the IDEA. In order to receive IDEA Part B flow-through funds, George Washington Academy must have in effect a USBE-approved special education program (Rules X.B.2.), including policies and procedures that are consistent with the Rules.
3. George Washington Academy must have a USBE-approved special education program (UCA 53F-2-307). George Washington Academy's program is approved by the state board when George Washington Academy's special education policies and procedures are approved by the USBE special education staff and then by George Washington Academy's local board in a public meeting. The LEA must submit documentation of the local board's approval to the USBE special education staff.
4. The USBE approval of George Washington Academy's policies and procedures includes the approval of any supporting documentation necessary to ensure their implementation. All required minimum components of Rules IX.A.4.a-e are addressed in this policies and procedures manual.
5. As part of establishing eligibility for Part B funds, George Washington Academy must have revised policies and procedures in alignment with the IDEA 2004 final regulations and current rules within one year of the final Board approval of the Rules.
6. Policies and procedures submitted by George Washington Academy in accordance with this section, and approved by the USBE staff, remain in effect until any of the following occur (34 CFR § 300.220):
  - a. George Washington Academy submits modifications to the USBE staff that the USBE or LEA determines are necessary;
    - (1) The provisions of the Rules apply to any modifications in an LEA's policies and procedures in the same manner and to the same extent as the LEA's original policies and procedures.

- b. The USBE staff gives George Washington Academy notice of a new interpretation of the IDEA by Federal or State courts, or a change in Federal statute; or
  - c. There is an official finding of noncompliance with Federal or State law or regulations that requires a change in George Washington Academy's policy and procedures.
7. George Washington Academy must have on file with the USBE staff information to demonstrate that it will make available to parents of students with disabilities or student who is an adult and to the general public all documents relating to the eligibility of the LEA under Part B of the IDEA (34 CFR § 300.212).
8. George Washington Academy creates annual improvement goals based on the State Performance Plan (SPP) and Annual Performance Report (APR) Indicators to improve outcomes for students with disabilities (Rules IX.A.4.d(2)(s)).
9. George Washington Academy collects and provides additional information which the USBE may require in order to meet Federal reporting requirements, including suspension and expulsion rates, LRE environments, disproportionality data, personnel information, and others (Rules IX.A.4.e.).

**IX.B. USE OF PART B FEDERAL FUNDS BY THE LEA (34 CFR §§ 300.200–206, 208; RULES IX.B.)**

1. George Washington Academy submits a plan that provides assurances to the USBE that George Washington Academy meets each of the conditions in this section (34 CFR § 300.200).
2. George Washington Academy, in providing for the education of students with disabilities within its jurisdiction, must have in effect policies, procedures, and programs that are consistent with the State policies and procedures established in Rules (34 CFR § 300.201).
3. Use of amounts (34 CFR § 300.202).
  - a. George Washington Academy must have on file with the USBE staff information to demonstrate that amounts provided to the LEA under Part B of the IDEA:
    - (1) Must be expended in accordance with the applicable provision of the Rules;
    - (2) Must be used only to pay the excess costs of providing special education and related services to students with disabilities consistent with the Rules; and
    - (3) Must be used to supplement State, local, and other Federal funds and not to supplant those funds.
4. The excess cost requirement prevents George Washington Academy from using funds provided under Part B of the IDEA to pay for all the costs directly attributable to the education of a student with a disability.

5. George Washington Academy meets the excess cost requirement if it has spent at least a minimum average amount for the education of its students with disabilities before funds under Part B of the IDEA are used.
6. Maintenance of effort (MOE) (34 CFR § 300.203).
  - a. Eligibility standard.
    - (1) For purposes of establishing George Washington Academy’s eligibility for an award for a fiscal year, the USBE must determine that George Washington Academy budgets for the education of students with disabilities for at least the same amount, from at least one of the following sources, as the LEA spent for that purpose from the same source for the most recent fiscal year for which information is available:
      - (a) Local funds only;
      - (b) The combination of State and local funds;
      - (c) Local funds only on a per capita basis; or
      - (d) The combination of State and local funds on a per capita basis.
    - (2) When determining the amount of funds that George Washington Academy must budget to meet the requirement in the Rules IX.B.6.a.(1), George Washington Academy may take into consideration, to the extent the information is available, the exceptions and adjustment provided in 34 CFR §§ 300.204 and 300.205 that George Washington Academy:
      - (a) Took in the intervening year or years between the most recent fiscal year for which information is available and the fiscal year for which George Washington Academy is budgeting; and
      - (b) Reasonably expects to take in the fiscal year for which George Washington Academy is budgeting.
    - (3) Expenditures made from funds provided by the Federal government for which the USBE is required to account to the Federal government or for which George Washington Academy is required to account to the Federal government directly or through the USBE may not be considered in determining whether George Washington Academy meets the standard in Rules IX.B.6.a.(1).
  - b. Compliance standard.
    - (1) Except as provided in 34 CFR §§ 300.204 and 300.205, funds provided to George Washington Academy under Part B of the IDEA must not be used to reduce the level of expenditures for the education of students with disabilities made by George Washington Academy from local funds below the level of those expenditures for the preceding fiscal year.



- (2) George Washington Academy meets this standard if it does not reduce the level of expenditures for the education of students with disabilities made by George Washington Academy from at least one of the following sources below the level of those expenditures from the same source for the preceding fiscal year, except as provided in 34 CFR §§ 300.204 and 300.205:
    - (a) Local funds only;
    - (b) The combination of State and local funds;
    - (c) Local funds only on a per capita basis; or
    - (d) The combination of State and local funds on a per capita basis.
  - (3) Expenditures made from funds provided by the Federal government for which the USBE is required to account to the Federal government or for which George Washington Academy is required to account to the Federal government directly or through the USBE may not be considered in determining whether an LEA meets the standard of Rules IX.B.6.b.(1) and IX.B.6.b.(2).
- c. Subsequent years.
- (1) If, in the fiscal year beginning on July 1, 2013 or July 1, 2014, George Washington Academy fails to meet the requirements of 34 CFR § 300.203 in effect at that time, the level of expenditures required of George Washington Academy for the fiscal year subsequent to the year of the failure is the amount that would have been required in the absence of that failure, not George Washington Academy's reduced level of expenditures.
  - (2) If, in any fiscal year beginning on or after July 1, 2015, George Washington Academy fails to meet the requirement of Rules IX.B.6.b.(2)(a) or IX.B.6.b.(2)(c) and George Washington Academy is relying on local funds only, or local funds only on a per capita basis, to meet the requirements of Rules IX.B.6.a or IX.B.6.b, the level of expenditures required of George Washington Academy for the fiscal year subsequent to the year of the failure is the amount that would have been required under Rules IX.B.6.b.(2)(a) or IX.B.6.b.(2)(c) in the absence of that failure, not George Washington Academy's reduced level of expenditures.
  - (3) If, in any fiscal year beginning on or after July 1, 2015, George Washington Academy fails to meet the requirement of Rules IX.B.6.b.(2)(b) or IX.B.6.b.(2)(d) and George Washington Academy is relying on the combination of State and local funds, or the combination of State and local funds on a per capita basis, to meet the requirements of Rules IX.B.6.a or IX.B.6.b, the level of expenditures required of George Washington Academy for the fiscal year subsequent to the year of the failure is the amount that would have been required

under Rules IX.B.6.b.(2)(b) or IX.B.6.b.(2)(d) in the absence of that failure, not George Washington Academy's reduced level of expenditures.

d. Consequence of failure to maintain effort.

- (1) If George Washington Academy fails to maintain its level of expenditures for the education of students with disabilities in accordance with Rules IX.B.6.b, the USBE is liable in a recovery action under section 452 of the GEPA (20 USC § 1234a) to return to the Department, using non-Federal funds, an amount equal to the amount by which George Washington Academy failed to maintain its level of expenditures in accordance with Rules IX.B.6.b. in that fiscal year, or the amount of George Washington Academy's Part B subgrant in that fiscal year, whichever is lower.
- (2) If the USBE is required to return funds to the Department because of George Washington Academy's failure to meet the Maintenance of Effort requirement, the USBE shall reduce the amount provided to the George Washington Academy's MSP Basic Program on a 1/12 basis.

7. Exception to maintenance of effort (34 CFR § 300.204).

a. George Washington Academy may reduce the level of expenditures by George Washington Academy under Part B of the IDEA below the level of those expenditures for the preceding fiscal year if the reduction is attributable to any of the following:

- (1) The voluntary departure, by retirement or otherwise, or departure for just cause, of special education or related services personnel.
- (2) A decrease in the enrollment of students with disabilities.
- (3) The termination of the obligation of George Washington Academy, consistent with this part, to provide a program of special education to a particular student with a disability that is an exceptionally costly program, as determined by the USBE staff, because the student:
  - (a) Has left the jurisdiction of George Washington Academy;
  - (b) Has reached the age at which the obligation of George Washington Academy to provide a FAPE to the student has terminated; or
  - (c) No longer needs the program of special education.
- (4) The termination of costly expenditures for long-term purchases, such as the acquisition of equipment or the construction of school facilities.
- (5) The assumption of cost by the high-cost fund (i.e., Intensive Services fund) operated by the USBE staff.

8. Adjustment to local fiscal efforts in certain fiscal years (34 CFR § 300.205).

- a. For any fiscal year for which the allocation received by George Washington Academy under Part B of the IDEA exceeds the amount George Washington Academy received for the previous fiscal year, George Washington Academy may reduce the level of expenditures otherwise required by maintenance of efforts requirements by not more than 50 percent of the amount of that excess.
  - b. Use of amounts to carry out activities under ESEA/ESSA.
    - (1) If George Washington Academy exercises the authority to reduce the level of expenditures due to an increase in Part B funds, George Washington Academy must use an amount of local funds equal to the reduction in expenditures to carry out activities that could be supported with funds under the ESEA/ESSA, regardless of whether George Washington Academy is using funds under the ESEA/ESSA for those activities.
  - c. The USBE staff must prohibit George Washington Academy from reducing the level of expenditures for a fiscal year, if the USBE staff determines that:
    - (1) George Washington Academy is unable to establish and maintain programs of FAPE that meet the requirements of Part B of the IDEA, or
    - (2) The USBE staff has taken action against George Washington Academy under Section 616 of the IDEA and subpart F of the regulations (Monitoring, Technical Assistance, and Enforcement).
  - d. The amount of funds expended by George Washington Academy for mandatory or voluntary Coordinated Early Intervening Services shall count toward the maximum amount of expenditures that George Washington Academy may reduce under the requirements of this section.
9. If the USBE staff determines that George Washington Academy is not meeting the requirements of Rules, the USBE staff may prohibit George Washington Academy from treating funds received under Part B of the IDEA as local funds under this section for any fiscal year, but only if it is authorized to do so by the State constitution or State statute.
10. School-wide programs under Title I of the ESEA/ESSA (34 CFR § 300.206).
- a. George Washington Academy may use funds received under Part B of the IDEA for any fiscal year to carry out a school-wide program under section 1114 of the ESEA/ESSA, except that the amount used in any school-wide program may not exceed the amount received by George Washington Academy under Part B of the IDEA for that fiscal year:
    - (1) Divided by the number of students with disabilities in the jurisdiction of the LEA; and
    - (2) Multiplied by the number of students with disabilities participating in the school-wide program.

- b. The funds described in this section must be considered as Federal Part B funds for purposes of the calculations required for excess costs and supplanting.
- c. The funds may be used without regard to the requirements of 34 CFR § 300.202(a)(1) of the IDEA.
- d. All other requirements of Part B of the IDEA must be met by George Washington Academy using Part B funds for school-wide programs under section 1114 of the ESEA/ESSA, including ensuring that students with disabilities in school-wide program schools:
  - (1) Receive services in accordance with a properly developed IEP; and
  - (2) Are afforded all of the rights and services guaranteed to students with disabilities under Part B of the IDEA.A.

**IX.C. CHARTER SCHOOLS AND THEIR STUDENTS (34 CFR § 300.209; RULES IX.C.)**

- 1. Students with disabilities ages 3 through 21 who attend public charter schools and their parent(s) or adult students retain all rights under Part B of the IDEA and the Rules.
- 2. If the public charter school is an LEA that receives funding under Part B or State special education funding, that charter school is responsible for ensuring that all of the requirements of Part B of the IDEA and the Rules are met. Charter schools may not refer potential or enrolled students with disabilities back to their school district of residence due to a disability, child find, or need for special education and related services, including placements.
- 3. If the public charter school is not an LEA receiving funding under Part B or State special education funding, or a school that is part of an LEA receiving funding under Part B or State special education funding, the USBE is responsible for ensuring that the requirements of Part B and the Rules are met.
  - a. Nothing in the Rules prohibit school districts and charter schools from developing a Memorandum of Understanding (MOU) to address student specific needs and/or placements.

**IX.D. COORDINATED EARLY INTERVENING SERVICES (CEIS) (34 CFR § 300.226; RULES IX.D.)**

- 1. George Washington Academy may not use more than 15 percent of the amount George Washington Academy receives under Part B of the IDEA for any fiscal year, less any amount reduced by the LEA pursuant to maintenance of effort, if any, in combination with other amounts (which may include amounts other than education funds), to develop and implement coordinated early intervening services (CEIS), which may include interagency financing structures, for students in kindergarten through grade 12 (with a particular emphasis on students in kindergarten through grade three) who are not currently identified

as needing special education or related services, but who need additional academic and behavioral support to succeed in a general education environment.

2. In implementing CEIS, George Washington Academy may carry out activities that include:
  - a. Professional learning (which may be provided by entities other than LEAs) for teachers and other school staff to enable such personnel to deliver scientifically based academic and behavior interventions, including scientifically based literacy instruction, and, where appropriate, instruction on the use of adaptive and instructional software; and
  - b. Providing educational and behavioral evaluations, services, and supports, including scientifically based literacy instruction.
3. CEIS may not be used to limit or create a right to FAPE under Part B of the IDEA or to delay appropriate evaluation of a student suspected of having a disability.
4. George Washington Academy that develops and maintains coordinated early intervening services (either mandatory or voluntarily) under this section must annually report to the USBE staff on:
  - a. The number of students served under this section who received early intervening services; and
  - b. The number of students served under this section who received early intervening services and subsequently receive special education and related services under Part B of the IDEA during the preceding two-year period.
5. Funds made available to carry out this section may be used to carry out coordinated early intervening services aligned with activities funded by, and carried out under, the ESEA/ESSA if those funds are used to supplement, and not supplant, funds made available under the ESEA/ESSA for the activities and services assisted under this section.

**IX.E. PERSONNEL DEVELOPMENT (34 CFR § 300.207; RULES IX.E.)**

1. George Washington Academy must 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 and section 2122 of the ESEA/ESSA, as well as 34 CFR § 300.156; R277-304, R277-306, R277-320, and R277-324.
2. Paraeducators, when used to carry out Part B of the IDEA, must be appropriately trained and supervised, and utilized in accordance with the USBE Paraeducator Standards.
  - a. George Washington Academy shall provide documentation of training and supervision to USBE staff upon request.

**IX.F. FUNDED PREVALENCE OF DISABLING CONDITIONS (UCA 53F-2-307; RULES IX.F.)**

1. When calculating and applying the growth factor, a school district's total special education average daily membership (ADM) for a given year is limited to the following percentage of the school district's total student ADM for the same year:
  - a. For a school district in a county of the first, second, or third class, 14%; and
  - b. For a school district in the county of the fourth, fifth, or sixth class, 20%..

**IX.G. LEA PROVISION OF FAPE (34 CFR § 300.101; RULES IX.G.)**

1. George Washington Academy remains obligated to provide a student with a disability with a FAPE even when George Washington Academy has not personally engaged with the student during the prior ten consecutive days and therefore may no longer count the student as an eligible student under pupil accounting (R277-419).
2. George Washington Academy will oversee the caseload of each special educator (including psychologists, social workers, speech language pathologists, occupational therapists, physical therapists, adapted physical education specialists, and any other related servers) to ensure that a FAPE is available to all eligible students with disabilities.

**IX.H. ROUTINE CHECKING OF HEARING AIDS AND EXTERNAL COMPONENTS OF SURGICALLY IMPLANTED MEDICAL DEVICES (34 CFR § 300.113; RULES IX.H.)**

1. Hearing aids. George Washington Academy must ensure that hearing aids worn in school by students with hearing loss, including deafness, are functioning properly.
2. External components of surgically implanted medical devices.
  - a. Subject to Rules IX.H.2.b, each public agency must ensure that the external components of surgically implanted medical devices are functioning properly.
  - b. For a student with a surgically implanted medical device who is receiving special education and related services, George Washington Academy is not responsible for the post-surgical maintenance, programming, or replacement of the medical device that has been surgically implanted (or of an external component of the surgically implanted medical device).

**IX.I. EDUCATOR LICENSE REQUIREMENTS (R277-301, R277-304, R277-306, AND R277-320; RULES IX.I.)**

1. Professionals providing services to students with disabilities must 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 hold appropriate Utah licensure. George Washington Academy superintendent or charter school administration shall be responsible for the evaluation of the appropriateness of licenses and

endorsements when assigning staff members. George Washington Academy refers to the USBE Teaching, Leadership, and Paraeducator Standards.

2. "License areas of concentration" or "license area" means a designation on a license of the specific educational setting or role for which the individual is qualified, to include the following:
  - a. Early Childhood;
  - b. Elementary;
  - c. Secondary;
  - d. School Leadership
  - e. Career and Technical Education or "CTE";
  - f. School Counselor;
  - g. School Psychologist;
  - h. Special Education;
  - i. Preschool Special Education;
  - j. Deaf Education;
  - k. Speech-Language Pathologist;
  - l. Speech-Language Technician;
  - m. School Social Worker; and
  - n. Audiologist. (R277-301-2.7(a)).
3. Individuals providing psychological evaluation services for students with disabilities must hold a Utah education license for school psychologists or State licensure and meet the assessment publisher's criteria for administration.
4. An adapted physical education endorsement is required for special educators and general educators to teach adapted physical education.

**IX.J. PURCHASE OF INSTRUCTIONAL MATERIAL IN ACCESSIBLE FORMATS (34 CFR § 300.210; RULES IX.J.)**

1. An LEA that chooses to coordinate with the NIMAC, when purchasing print instructional materials, must acquire those instructional materials in the same manner, and subject to the same conditions as the USBE under Rules VIII.W.
2. If George Washington Academy chooses not to coordinate with the NIMAC, George Washington Academy must provide an assurance to the USBE that George Washington

Academy will provide instructional materials to blind persons or other persons with print disabilities in a timely manner.

3. Nothing in this section relieves George Washington Academy of its responsibility to ensure that students with disabilities who need instructional materials in accessible formats but are not included under the definition of blind or other persons with print disabilities or who need materials that cannot be produced from NIMAS files, receive those instructional materials in a timely manner.
4. For all purposes of this section, the USBE defines timely manner as follows: the USBE and LEAs must take reasonable steps to provide instructional materials in accessible formats to students with disabilities who need those instructional materials at the same time as other students receive instructional materials.



## **X. SPECIAL EDUCATION FUNDING**

1. The USBE has a responsibility under both Federal and State law to monitor implementation of the IDEA by LEAs through a system of general supervision that improves educational results and functional outcomes and ensures that public agencies meet program requirements. The special education program that is funded both from federal and state funds and it is critical to understand the similarities and differences of these funding sources.
2. *Federal special education funds* means funds paid to the State under IDEA Part B for the purposes of special education.
3. *State special education funds* means state funds appropriated to public education for the purposes of special education.
4. Federal special education funds are calculated, allocated, and classified differently than state special education funds. The Rules outline the regulations, restrictions, and allowable costs and activities applicable to each funding source; some requirements are the same for both funding sources and some provisions apply only to one or the other.

### **X.A. STATE SPECIAL EDUCATION FUNDS GENERALLY (UCA 53F-2-307; RULES X.A.1-2.)**

1. State special education funds may be spent only for direct costs and construction or altering existing facilities, as outlined in the Rules.
  - a. Direct costs are those elements of cost which can be easily, obviously, and conveniently identified with specific special education activities or programs, as distinguished from those costs incurred for several different activities or programs and whose elements are not readily identifiable with specific special education activities.
  - b. Constructing facilities or altering existing facilities if:
    - (1) The costs are necessary costs and reasonable costs;
    - (2) The costs are not for the general purpose of bringing facilities into compliance with:
      - (a) Section 504 of the Rehabilitation Act of 1973; or
      - (b) The Americans with Disabilities Act of 1990, 42 U.S.C. 12101 et seq.;
    - (3) The construction or alteration meets the needs of one or more students with disabilities; and
    - (4) George Washington Academy submits an application for review by the state board;

- (5) The state board approves the expenditure in accordance with rules, including requirements that:
  - (a) George Washington Academy has not been identified with significant disproportionality;
  - (b) George Washington Academy has no outstanding uncorrected findings of non-compliance;
  - (c) George Washington Academy has no dispute resolution findings related to FAPE in the past year;
  - (d) George Washington Academy has been determined to “meet requirements” based on the USBE’s programmatic Results Driven Accountability/Annual Performance Report (RDA/APR); and
  - (e) No other evidence, e.g., from school accreditation, fiscal audits, etc., indicators that George Washington Academy is not adequately providing FAPE.
2. State special education funds are appropriated to the MSP and provide restricted (categorical) monies that must be spent for the education of students with disabilities.

**X.B. ALLOCATION OF STATE SPECIAL EDUCATION FUNDS FOR PROGRAMS FOR STUDENTS WITH DISABILITIES (UCA 53F-2-307; R277-479; RULES X.B.3.)**

1. George Washington Academy must be current with the UPIPS monitoring requirements, including correction of noncompliance within one year of notification, annual Corrective Action Plan (CAP) and PIP reports, and desk audit submissions to be eligible for State special education funds.

**X.C. SPECIAL EDUCATION ADD-ON ALLOWABLE USE (FUND1205) (UCA 53F-2-307(1); RULES X.C.)**

1. George Washington Academy must use funds in accordance with Rules X.B. and to cover the direct costs of providing special education to students with disabilities.

**X.D. SPECIAL EDUCATION SELF-CONTAINED ALLOWABLE USE (FUND 1210) (UCA 53F-2-307, -308(3); RULES X.E.)**

1. *Self-contained* means a student in public-school with an IEP or a youth in custody/care (YIC) who receives 180 minutes or more of special education or YIC services during a typical school day per R277-419-2(35).
2. George Washington Academy must use Special Education Self-Contained funds only for direct costs attributable to the cost of the special education of students with disabilities whose placement is a special class or self-contained environment.

**X.E. STATE SPECIAL EDUCATION IMPACT AID ALLOWABLE USE (FUND 1225) (UCA 53F-2-307(1); RULES X.I.)**

1. Must be used for direct costs attributable to the cost of administering the special education program as follows:
  - a. Costs for students in state custody (prisons, detention facilities, and the state hospital)
  - b. Additional costs attributable for services to students with low-incidence disabilities
2. Funds must be used in accordance with Rules X.B. and to cover the direct costs of providing special education to students with disabilities.

**X.F. STATE SPECIAL EDUCATION EXTENDED SCHOOL YEAR (ESY) ALLOWABLE USE (FUND 1220) (UCA 53F-2-308(2); RULES X.K.)**

1. Must be used for direct costs attributable to the cost of ESY provided to students with disabilities, determined by the student's IEP team to require ESY) in order to receive a FAPE and in accordance with R277-751.
2. Funds must be used in accordance with Rules X.B. and to cover the direct costs of providing special education to students with disabilities in accordance with R277-751.51.

**X.G. STATE EXTENDED SCHOOL YEAR STIPEND FOR SPECIAL EDUCATORS (EYSE) ALLOWABLE USE (FUND 1278) (UCA 53F-2-310; RULES X.M.)**

1. Must be used for salaries and allowable benefits of Special Education Teachers, or Speech Language Pathologists who provide eligible services under R277- 525- 2.
2. A special educator receiving a stipend shall: (a) work an additional day beyond the number of days contracted with the special educator's school district or school for each daily stipend; (b) schedule the additional days of work before or after the school year; and (c) use the additional days of work to perform duties related to the IEP process, including: administering student assessments, conducting IEP meetings, writing IEP's, conferring with parent(s) or student who is an adult, and preparing and maintaining records.

**X.H. STATE SPECIAL EDUCATION INTENSIVE SERVICES ALLOWABLE USE (FUND1230) (UCA 53F-2-309(1); RULES X.O.)**

1. Must be used for direct costs attributable to the cost of implementing IEPs for students with disabilities.
2. Cost of services to a student with a disability must be in excess of three times the annual average per pupil expenditure (APPE) as calculated by USBE Financial Operations.
3. Costs must meet the eligibility requirements outlined in R277-752.

**X.I. STATE SPECIAL EDUCATION FUNDS ALLOWABLE USE (UCA 53F-2-307; RULES X.P.)**

1. State special education funds may be spent only for direct costs and construction or altering existing facilities as outlined in Rules X.A. and X.B., Direct costs are those elements of cost which can be easily, obviously, and conveniently identified with specific special education activities or programs, as distinguished from those costs incurred for several different activities or programs and whose elements are not readily identifiable with specific special education activities (Rules X.A.1.).
2. The costs of providing for specially designed instruction, related services, and supplementary aids and services provided in a regular class or other education- related setting to a student with a disability in accordance with the IEP of the student are allowable.
3. The costs of providing inclusive special education preschool services are an allowable excess cost.
4. The costs of including peer models in IEP services that require a peer model are allowable.
5. The costs of providing co-teaching, in which both a licensed general educator and licensed special education teacher plan and provide specially designed instruction are allowable.
6. George Washington Academy follows the allowable use of state special education funds as listed in Rules X.P.6.

**X.J. ALLOWABLE COSTS FOR FEDERAL (IDEA) SPECIAL EDUCATION FUNDS (RULES X.R.1., 4-8.)**

1. Funds paid to the State under IDEA Part B for the purposes of special education (“Federal special education funds”) are calculated, allocated, and classified according to 34 CFR §300.705.
2. George Washington Academy will use Federal special education funds for the costs of providing for specially designed instruction, related services, and supplementary aids and services provided in a regular class or other education- related setting to a student with a disability in accordance with the IEP of the student are allowable.
3. George Washington Academy will use Federal special education funds for the costs of including peer models in IEP services that require a peer model are allowable.
4. George Washington Academy will use Federal special education funds for the costs of providing co-teaching, in which both a licensed general educator and licensed special education teacher plan and provide specially designed instruction are allowable.
5. George Washington Academy follows the allowable use of Federal special education funds, as listed in Rules X.R.8.



## PROPOSAL FOR BOARD ACTION

**Proposal Title:** Mango Phone System

**Submitted by:** Steve Erickson

**Originating Committee:** Technology Committee

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

**Situation:**

We need to renew our phone system for the 2023-24 school year.

**Background Information, including a list of reviewing committees:**

**Assessment:**

**Recommendation:**

Please accept the quote for our phone system renewal for the amount of \$10,415.95.

Please submit this form with all accompanying paperwork to the Board Secretary, Deborah Odenwalder, at [dodenwalder@gwacademy.org](mailto:dodenwalder@gwacademy.org) by the 15<sup>th</sup> day of the month of the Board meeting.



## **GWA Procedure for Processing and Approving Purchase Requisitions**

1. All employees must complete a Purchase Requisition for approval prior to purchasing items. Teachers may purchase items for their classroom out of their teacher accounts and then complete the form for reimbursement, but must follow guidelines for Teacher Supply Accounts (classroom supplies and materials only). Requests for ALL REIMBURSEMENTS must be approved by the Executive Director.
  
2. After completing all necessary information, place the completed requisition form in the Purchasing Secretary's box. If an error occurs when filling out the document, it must be corrected with a single line through the error and initialed. No white-out may be used.
  
3. The Purchasing Secretary will then complete the following steps:
  - a. Verify that the Purchase Requisition is filled out completely, including Name, Date, Quantity, Description, Item #, Cost, and Company Information
  - b. Verify that the funds are available in the budget for the purchase or reimbursement.
  - c. Enter request into the Purchase Order Log.
  - d. Forwards the requisition to the individual(s) authorized to approve purchase requests.
  
4. When a Purchase Requisition is presented for approval, the individual(s) authorized to do so must:
  - a. Verify the Purchase Requisition is filled out completely, including Name, Date, Quantity, Description, Item #, Cost, and Company Information
  - b. Verify, when questions exist, that the purchase meets the needs of the school.
  - c. Verify that the funds are available in the budget for the purchase.
  - d. Places the approved requisition in the Purchasing Secretary's box
  
5. The Purchasing Secretary will then complete the following steps:
  - a. Verify that all appropriate signatures are on the Purchase Request. If a Travel/Meeting Request Estimate is included, Purchasing Secretary will book arrangements
  - b. Place the order with the vendor
  - c. Emails the Requestor that the item has been ordered and an estimated delivery date

**\*\*\*IMPORTANT:**

Items that have been delivered **MUST** be received by the Purchasing Secretary **BEFORE** you pick them up. This is a very important part of our purchasing system. If it is an absolute emergency, the Executive Director or Administrative Services Director are the only ones who can approve you taking these items before due process has taken place with the Purchasing Secretary.



446 S Mall Drive St. George, UT 84790



435-767-0337



billing@mangovoice.com



www.mangovoice.com

Invoice # : IN150523  
Invoice Date : 06/09/2023  
Account # : 052020-00001945

### Billing Summary

Previous Balance	\$0.00
Payment / Adjustment Applied	\$0.00
Previous Dues	\$0.00

### Account Charges & Credits

Current Charges	\$9,503.64
Taxes	\$912.31
Late fee	\$0.00
Payment / Credits / Transfers	\$0.00

<b>Current Amount Due</b>	<b>\$10,415.95</b>
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<b>Total Amount Due</b>	<b>\$10,415.95</b>
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Due by 06/09/2023

# Thank You

for your prompt payment and continued business.

### Payment Instructions

Please reference invoice number with your payment

#### Mail checks made payable to:

Mango  
446 S Mall Drive  
St. George, UT 84790

#### Bill To:

George Washington Academy  
2277 S 3000 E  
Saint George, UT 84790

#### Account Number :

**052020-00001945**

Invoice Number	: IN150523
Billing Date	: 06/09/2023
Current Charges	: \$10415.95
<b>Total Due</b>	<b>: \$10415.95</b>



**Account: George Washington Academy**

**Customer Location:**

2277 S 3000 E, Saint George, UT 84790

CHARGE PERIOD	TAX	PLAN/PRODUCT	AMOUNT
06/09/2023 - 06/08/2024		<b>E911 Compliance - Annual</b> x 1 Unit at \$59.76	\$59.76
06/09/2023 - 06/08/2024	<b>DESCRIPTION</b>	<b>E911 Recovery Tax - Annual</b>	
	State Universal Service Fund	x 12 Unit at \$0.00	
	E-911		\$0.00
			\$17.76
	<b>TOTAL TAX</b>		\$17.76
06/09/2023 - 06/08/2024		<b>Mango - Annual</b> x 78 Unit at \$60.00	\$4,680.00
06/09/2023 - 06/08/2024	<b>DESCRIPTION</b>	<b>Mango Digital Line - Annual</b>	
	Sales Tax NF	x 78 Unit at \$60.00	
	Statutory Gross Receipts NF		\$0.00
	FCC Regulatory Fee (VoIP)		\$13.73
	FUSF (VoIP)		\$880.82
	<b>TOTAL TAX</b>		\$894.55
06/09/2023 - 06/08/2024		<b>Regulatory Fee - Annual</b> x 1 Unit at \$83.88	\$83.88
<b>Total Charges</b>			<b>\$10,415.95</b>



## PROPOSAL FOR BOARD ACTION

**Proposal Title:** Asphalt Seal (Where Portable was sitting) and crack repair

**Submitted by:** Steve Erickson

**Originating Committee:** Campus Management

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

### **Situation:**

Seal big parking lot where the portable was sitting.  
Fill in cracks in the playground area and front big parking lot.

### **Background Information, including a list of reviewing committees:**

Since removing the portable we need to fill in four square holes, seal the asphalt and fix some cracks that are in the parking lot. We also need to move the handicap spaces closer to the school and repaint the rest of the parking lot. There are also cracks in the asphalt in the playground area and the big parking lot out front that need to be filled.

### **Assessment:**

### **Recommendation:**

We reached out to a few companies for a quote. The only quotes we have so far are from Holbrook. We have used this company in the past and feel that they have done a great job. The Campus Management Committee recommends going with Holbrook at using the HA5 sealant quote for \$10,271.10.

Please submit this form with all accompanying paperwork to the Board Secretary, Deborah Odenwalder, at [dodenwalder@gwacademy.org](mailto:dodenwalder@gwacademy.org) by the 15<sup>th</sup> day of the month of the Board meeting.





**Project Location**

George Washington Academy  
2277 So 3000 E  
Saint George UT 84790

**Proposal #**

HAU947744

**Date Issued**

6/6/2023

**PO/LD #**

**Terms**

Due Upon Completion

**Adviser Information**

Jeff Poulton  
P: 435-229-2688 | E: jeff@holbrookasphalt.com

**Description**

HA5, Crack Repair and Striping

**Bill To**

George Washington Academy  
2277 So 3000 E  
Saint George UT 84790

Item	Quantity	UM	Rate	Amount
<b>R&amp;R Patching (16 SF)</b> YELLOW AREAS ON MAP Saw cut, remove existing asphalt, prepare and compact existing Road Base. Install & compact up to 3" with Hot Mix Asphalt.		LS		1,537.50
<b>Crack Repair (6,824 LF)</b> RED AREAS ON MAP Clean & prepare cracks if necessary. Install Hot-Applied Elastomeric Sealant to all cracks larger than 1/4 inch.		LS		5,118.00
<b>HA5 High Density Mineral Bond (3,582 SF)</b> BLUE AREAS ON MAP Clean & prepare surface using high pressure air & wire bristle brooms. Install "HA5" High Density Mineral Bond advanced performance pavement preservation treatment. No guarantee surface treatments will adhere to areas saturated with motor oil. HA5 meets demands of High Density Mineral Bond Specification established by agency engineers.		LS		2,865.60
<b>Pavement Markings</b> Includes all stripes, symbols, and lettering on the pavement surface to follow existing pattern. Pricing is based on work being completed in one day (one mobilization), unless stated otherwise. Any striping or painting items not specified on this proposal line are not included. Any addition or reduction in work requires a signed change order. Change order will be billed upon completion.		LS		750.00
<b>Total</b>				<b>\$10,271.10</b>

Please sign for proposal acceptance: **Do not sign this page, see final page for signing**



**Project Location**  
 George Washington Academy  
 2277 So 3000 E  
 Saint George UT 84790

**Proposal #** HAU947745  
**Date Issued** 6/6/2023

**PO/LD #**

**Terms**  
 Due Upon Completion

**Adviser Information**  
 Jeff Poulton  
 P: 435-229-2688 | E: jeff@holbrookasphalt.com

**Description**  
 Premium Sealcoat, Crack Repair and Striping

**Bill To**  
 George Washington Academy  
 2277 So 3000 E  
 Saint George UT 84790

Item	Quantity	UM	Rate	Amount
<b>R&amp;R Patching (16 SF)</b> YELLOW AREAS ON MAP Saw cut, remove existing asphalt, prepare and compact existing Road Base. Install & compact up to 3" with Hot Mix Asphalt.		LS		1,537.50
<b>Crack Repair (6,824 LF)</b> RED AREAS ON MAP Clean & prepare cracks if necessary. Install Hot-Applied Elastomeric Sealant to all cracks larger than 1/4 inch.		LS		6,462.33
<b>Seal Coat Premium (3,582 SF)</b> BLUE AREAS ON MAP Clean & prepare surface using high pressure air & wire bristle brooms. Apply Emulsified Asphalt Sealer. No guarantee pavement preservation materials will adhere to areas saturated with motor oil.		LS		2,500.24
<b>Pavement Markings</b> Includes all stripes, symbols, and lettering on the pavement surface to follow existing pattern. Pricing is based on work being completed in one day (one mobilization), unless stated otherwise. Any striping or painting items not specified on this proposal line are not included. Any addition or reduction in work requires a signed change order. Change order will be billed upon completion.		LS		750.00

**Total** \$11,250.07

Please sign for proposal acceptance: **Do not sign this page, see final page for signing**





**Project Location**  
 George Washington Academy  
 2277 So 3000 E  
 Saint George UT 84790

**Proposal #** HAU947746  
**Date Issued** 6/6/2023  
**PO/LD #**

**Terms**  
 Due Upon Completion

**Adviser Information**  
 Jeff Poulton  
 P: 435-229-2688 | E: jeff@holbrookasphalt.com

**Bill To**  
 George Washington Academy  
 2277 So 3000 E  
 Saint George UT 84790

**Description**  
 Standard Sealcoat, Crack Repair and Striping

Item	Quantity	UM	Rate	Amount
<b>R&amp;R Patching (16 SF)</b> YELLOW AREAS ON MAP Saw cut, remove existing asphalt, prepare and compact existing Road Base. Install & compact up to 3" with Hot Mix Asphalt.		LS		1,537.50
<b>Crack Repair (6,824 LF)</b> RED AREAS ON MAP Clean & prepare cracks if necessary. Install Hot-Applied Elastomeric Sealant to all cracks larger than 1/4 inch.		LS		6,462.33
<b>Seal Coat Standard (3,582 SF)</b> BLUE AREAS ON MAP Clean & prepare surface using high pressure air & wire bristle brooms. Apply Emulsified Asphalt Sealer. No guarantee pavement preservation materials will adhere to areas saturated with motor oil or debris.		LS		2,299.64
<b>Pavement Markings</b> Includes all stripes, symbols, and lettering on the pavement surface to follow existing pattern. Pricing is based on work being completed in one day (one mobilization), unless stated otherwise. Any striping or painting items not specified on this proposal line are not included. Any addition or reduction in work requires a signed change order. Change order will be billed upon completion.		LS		750.00
<b>Total</b>				<b>\$11,049.47</b>

Please sign for proposal acceptance: **Do not sign this page, see final page for signing**



Date 6/9/2023 Number HAUB11717

Terms and Conditions

TERMS AND CONDITIONS: Any proposals returned to Holbrook Asphalt Company ("Contractor") more than 14 days after the proposal is submitted to the Client is subject to revision, updated pricing, or may be voided by Contractor. Engineering, tests, permits, inspection fees and bonding fees are not included in price unless stated otherwise. Pricing based on no more than area and depth dimensions listed. Upon construction, if it is determined that concrete or asphalt area or depth is greater than the estimation, client agrees to pricing adjustment as a result of project overrun. Client specifically represents and warrants that either the Client is the owner of the premises where the work is to be performed, or, in the alternative, Client has authority from the owner of the premises authorizing the Work to be performed on the said premises.

GENERAL EXCLUSIONS: Contractor is not liable for any ADA compliance, if needed, Client should consult with an ADA compliance professional prior to specific project approval. Contractor not responsible for claims related to pavement markings or lack thereof during or following project work. Contractor will not be responsible for its product failure if said failure is directly or indirectly caused by "Existing Surface Conditions," as defined below, and any written or implied warranty will become void. Existing Surface Conditions are defined as: water drainage issues or delamination or failure of existing paint, asphalt, surface sealer, wearing course or any other material that is in a failing or in an unstable state. If any portion of the project area has Existing Surface Conditions not caused or created by Contractor that impact Contractor's HA5 product or any other product Contractor applies to project area, the warranty is void. Client is responsible for having entry gates open on day of work. Any damage to gates, sensors or loop sensors above or below asphalt are responsibility of Client. Any hot-applied sealants will not be exactly level with pavement surface as material settles to fill voids. There may also be excess material on pavement surface. Regarding asphalt, concrete and excavation work: Contractor is not responsible for subgrade scarification, re-compaction or concrete damage due to removal of asphalt. Contractor is not responsible for existing condition of subgrade, drainage in areas of less than 1% grade, adjustments of utilities, manholes and valve covers. Contractor is not responsible for any damage to underground utilities and cost to repair the same.

PAYMENT TERMS: Payment is due upon completion of work (Completion by line item 'Progress Billing' and/or completion of project core). Payment is due upon Client receipt of invoice. Client understands and agrees that it will be billed for towing as incurred and will be due on receipt. If the Client has a discrepancy with the Contractor regarding the contracted work, a retention of 5% of invoice up to a maximum of \$750.00 may be retained by Client up to 45 days. Client agrees that it may be billed as each line item is completed and each item may become their own respective invoice and due upon receipt of the same. Contractor reserves the right to charge up to 50% of Proposal Total if client cancels project within 25 days of scheduled project commencement. Upon request, post-project walk-throughs may be scheduled to review concerns.

Client agrees that interest accrues on all past-due amounts at 24% per annum from invoice date, until paid in full; and may be billed collection fees of up to 40% and all fees incurred by collection efforts. Total Proposal price includes one mobilization unless stated otherwise. Additional mobilizations may be billed up to \$3,500 per additional mobilization. This agreement provides Client written Notice of Right to Lien. Pricing does not include bonding or prevailing wage/Davis Bacon Certification, unless stated otherwise. By signing this proposal (contract), Client agrees that Contractor may not be held liable for delays, conditions, or Acts of God beyond their control, which situations may delay or cause cancelation partially or entirely on any project. Delays include project demand and material supply.

INSURANCE: These insurance limits are listed by Contractor to inform Client of such. Any premiums above the following to be paid by Client. This disclosure overrules any other contract language wherein Contractor agrees to differing limits. Certificates available upon request. GENERAL LIABILITY: \$1m (inc.), \$2m (agg.) AUTO: \$1m UMBRELLA: \$2m (inc.), \$2m (agg.) PERSONAL INJ: \$1m WORKERS COMP: \$1m

ADDITIONAL HA5 WARRANTY LIMITATIONS AND EXCLUSIONS: No claim will be honored unless Holbrook Asphalt has been notified in writing and is given the opportunity to inspect the claimed failure. Surface treatments applied previous to HA5 being installed are not covered under this warranty. (For example, if a previously applied preservation treatment is peeling or delaminating from the pavement surface—even if the surface was cleaned and prepped prior to HA5 being installed on top of it—this warranty does not cover HA5 in these circumstances.) Any attempt to repair the surface prior to Holbrook Asphalt's inspection will render this warranty invalid. Areas where HA5 was installed over pavements with motor oil, brake fluid, hydraulic fluid, or other substances that disturb the adhesion of HA5 and that lead to delamination are not covered under warranty. This warranty does not cover structural defects in the asphalt (e.g. base failure or damage caused by faulty construction and or design), cracks, exposure to fuel, oil, or other chemicals determined to be harmful to the HA5 treatment, areas exposed to frequent sprinkler water run-off, or standing and/or ponding water, damage caused by heavy truck or equipment traffic, damage caused by equipment inflicting excessive stress or scraping to the pavement surface, damage caused by landscaping installation, or damage caused by earthquakes or other acts of God. Mechanical disturbances by snowplow chatter, studded tires, etc. are excluded from warranty. This warranty is not valid for areas located in elevations above 6500 feet. A valid Warranty Certificate must be signed with a copy returned to Holbrook Asphalt within 60 days of the HA5 installation for the warranty to be valid and executable.

Pre-mature wear of HA5 during the five-year period is defined as anything less than 70% residual inter-aggregate coverage of HA5 to the asphalt binder of the treated surface. If premature failure of HA5 is deemed by Holbrook Asphalt or an approved third-party expert within the five year period, reinstallation will take place at no charge or at the reduced rate identified on the Warranty Certificate for the project. Contractor reserves the right appoint the third-party expert should there be a dispute regarding the premature failure between the Client and Contractor. Client and Contractor agree to be bound by and abide by the decision of the third party expert regarding whether a premature failure has occurred.

I have read and agree with these terms and conditions. I elect to proceed with the signed option below.

HAU947744 - HA5, Crack Repair and Striping (Sign to accept this proposal)

Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_ Contractor \_\_\_\_\_

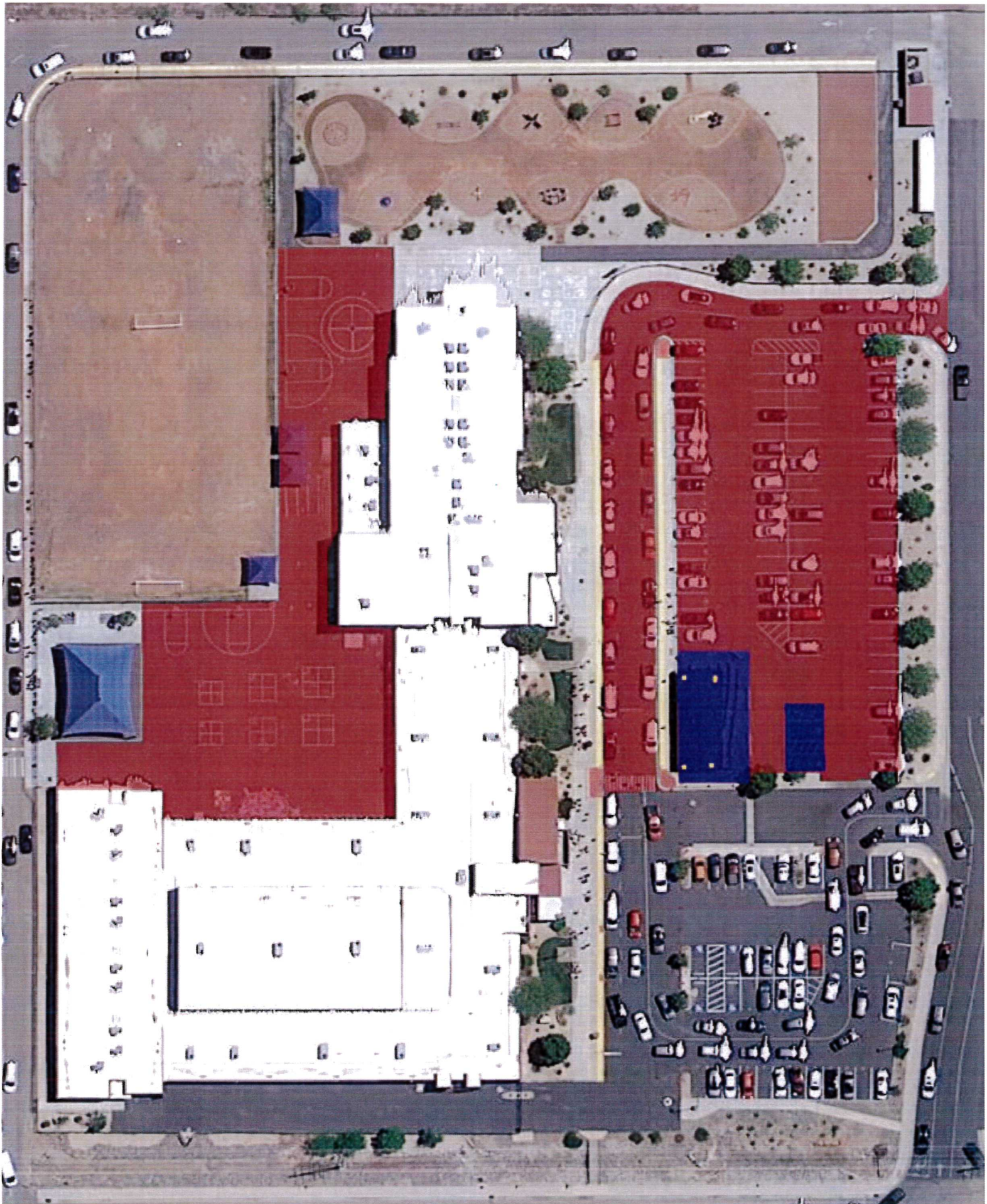
HAU947745 - Premium Sealcoat, Crack Repair and Striping (Sign to accept this proposal)

Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_ Contractor \_\_\_\_\_

HAU947746 - Standard Sealcoat, Crack Repair and Striping (Sign to accept this proposal)

Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_ Contractor \_\_\_\_\_









Erickson, Steven <serickson@gwacademy.org>

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## asphalt bids June 2023

1 message

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**Bentley, Jessica** <jbentley@gwacademy.org>

Wed, Jun 14, 2023 at 10:03 AM

To: Steven Erickson <serickson@gwacademy.org>

Alexander Asphalt

I called a few times went to a message recording and requested a bid on their website with no response.

Southern Utah Grade and Pave

I called and they are so booked out they do not have time to come out to bid on it.

Straight stripes

I called and spoke with Martin, he was going to come out but has not, I emailed him again on 6/14

--

**Jessica Bentley**

George Washington Academy

2277 S. 3000 E.

St. George, UT 84790

435-673-2232





**Wellhoff, Michael**

Hey Steve, If we have used HA5 on the rest of the parking lot, I move that we go with option A for the spots needed.

---



**Kevin Peterson**

I second that

---



**Sedgwick, Rod**

I vote yes.

---



**Dower, Brian**

Yes

---



**Ken Childs**

I vote yes on Holbrook as well. Sorry for the late responses.



## PROPOSAL FOR BOARD ACTION

**Proposal Title:** New Marquee on 3000 East

**Submitted by:** B.Clark

**Originating Committee:** Outreach and Finance

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

### **Situation:**

We are wanting to place a new marquee at a prime location for marketing and to share information with your stakeholders and community.

### **Background Information, including a list of reviewing committees:**

Even though the price is over \$50,000 no RFP was done because each company provided a different product. Jessica reached out to companies from the state site who had contracts, and local companies and contacted WCSD to see who they recommended. All vendors were given pictures of the old marquee, logo, vision for the new marquee and where the placement of the new marquee would go. Everyone submitted concept creative sign and graphics and came out to the property before quoting. All companies have a state or contract rate. WCSD uses Yesco.

### **Assessment:**

The difference between a high and medium resolution is the distance that you can view the screen from and have it look good. A high resolution can be viewed much closer than a medium. In this case, you can get as close as about 30 feet with a high resolution, while with a medium resolution you would need to be more like 75 feet to read it. Turn around time is 14-16 weeks. The tall pylon sign option with a single-color electronic display would be \$64,200. The tall pylon sign option with a full-color high resolution is \$94,190 and medium resolution is \$80,000. The warranty for the digital display is 5-year manufacturer parts, on-site labor is not covered. The balance of the display is a 1 year warranty.

### **Recommendation:**

Based on the graphics and designs that Holly shared in the May board meeting we are wanting to go with the Yesco full-color high resolution sign at \$94,190. \$60,000 would come from land and site improvement from the 2023 budget and the rest from the 2024 budget when installed.

Please submit this form with all accompanying paperwork to the Board Secretary, Deborah Odenwalder, at [dodenwalder@gwacademy.org](mailto:dodenwalder@gwacademy.org) by the 15<sup>th</sup> day of the month of the Board meeting.



## Agreement

### For Work At

Jessica Bentley  
George Washington Academy  
2277 S 3000 E  
St George UT 84790  
United States

### Billing Address

Washington County School District  
121 W Tabernacle St  
Saint George UT 84770-3338  
United States

### Account Executive

001111 Michael Cain  
[rcain@yesco.com](mailto:rcain@yesco.com)  
435-714-6711  
YESCO - St. George  
4679 S. River Road  
Saint George UT 84790  
United States

Date	Project Number	Project Description	Terms	Pricing Valid Until	Deposit
03/31/2023	PRY-46037	Marquee	Net 30	06/30/2023	

Item	Amount
<b>Scope</b> Manufacture and install 1 pylon sign per art 53794 R1. Includes 10mm resolution full color Daktronics EMC., training, software, and cellular communication to the sign for the life of the display. Manufacturer's 5 yr warranty on parts for the EMC.	
<b>Sign Sales &amp; Services - Taxable</b>	\$87,664.00
<b>Sign Sales &amp; Services - Non-taxable</b>	\$6,526.00
Subtotal	\$94,190.00
Tax Total (%)	\$0.00
<b>Total</b>	<b>\$94,190.00</b>

# Agreement Acceptance

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YESCO's Standard Terms and Conditions, available below and at [www.yesco.com/terms/standardtermsandconditions.pdf](http://www.yesco.com/terms/standardtermsandconditions.pdf), are an integral part of this agreement and are incorporated by reference. George Washington Academy acknowledges that it has accessed and reviewed the Standard Terms and Conditions. Upon acceptance by an authorized agent of YESCO LLC, this agreement becomes effective as of the last date signed below. This document is a complete integration and final expression of the agreement between the parties, and may not be amended, supplemented, or otherwise modified except by written agreement executed by authorized representatives of each.

<b>George Washington Academy</b>	<b>YESCO LLC</b>
Signature	Signature
Title	Title
Name	Name
Date Signed	Date Signed

# Standard Terms and Conditions

**1. Terms:** The terms and conditions described in this document are incorporated by reference into a written estimate, quotation, proposal, agreement, order, or other transaction form ("Transaction Document") (together with these YESCO Standard Terms and Conditions, the "Agreement"), and pertain to the manufacturing, repair, service, installation, or other goods or services provided by YESCO (the "Work", "goods", and/or "services") as requested by you, the Customer, as further described in the Transaction Document. "YESCO" refers to the entity providing the Work, as identified in the applicable Transaction Document, or in the absence thereof, YESCO LLC, a Utah limited liability company, doing business in California as YESCO Signs LLC.

**2. Pricing Exclusions:** YESCO's pricing does not include sales and use taxes, tariffs, customs fees, duties, or other charges levied by customs or taxing authorities, including any material cost increases due to the escalation of any of these costs ("Assessments"). Assessments may be noted in the Transaction Document; however, they are only estimates. You agree to pay the actual cost for these Assessments as invoiced by YESCO. You agree to bear the risk of Assessment increases in excess of the amounts included in the Transaction Document, including increases due to changes in sales tax rates, tariff increases, or similar occurrences.

**3. Payment:** In the absence of specified payment terms in the Transaction Document, you agree to pay 50% of the purchase price upon signing this Agreement and to pay the remaining balance upon completion of the Work. You agree to pay monthly payments, if any, on the first business day of each month in advance. If you choose to make payment(s) by credit card, you agree to pay a 2% surcharge on the total amount of such payment(s).

**4. Inspection:** You must carefully inspect the Work within ten calendar days after delivery. If the Work does not meet the written requirements as described in the Transaction Document, or if the Work has any defect in manufacture, installation, or operation, you must give YESCO written notice of the nonconformance or defect claimed within five calendar days. ABSENCE OF SUCH WRITTEN NOTICE SHALL BE CONCLUSIVE EVIDENCE THAT THE WORK IS ACCEPTABLE TO YOU AS DELIVERED. If a third-party carrier delivers any goods, you must inspect the goods and promptly notify YESCO and the carrier if any damage exists before moving the goods from the place of delivery. If damage exists, you must retain the packing materials and otherwise comply with all requirements necessary to preserve all claims against the carrier. If you or your agent moves the goods before inspecting the goods, accept the goods in a damaged condition, or otherwise fail to comply with the requirements of this paragraph, YESCO shall have no responsibility for defects notwithstanding the warranty set forth below.

**5. Installation:** If the Work involves installation of goods, additional work beyond that contemplated in the Agreement will be required if YESCO encounters subsurface or concealed conditions which are extraordinary or unexpected such as subsurface water, caliche, rock, utilities, or pipelines. You must compensate YESCO for such additional work on a time and materials basis at YESCO's standard rates. Further, YESCO shall not be responsible for damage to underground pipes, sewer lines, sprinkling systems, or any other underground obstructions unless notified of them in writing prior to commencement of the Work. Absent such written notification, you agree to pay for any resulting damage. YESCO is not an Exterior Insulation and Finish System ("EIFS") contractor, and if YESCO's responsibilities hereunder involve penetrations of EIFS, YESCO will seal such penetrations with products and procedures that are common in the sign industry—but which may not meet EIFS warranty requirements. YESCO shall thereafter have no responsibility for damage resulting from the penetrations.

## 6. Limited Warranty:

A. New Signs, Lighting, and other Manufactured Products. YESCO warrants that goods and services provided by YESCO (other than electronic displays and digitally-controlled lighting products) will be free from material defects in workmanship and materials for a period of one year from the date of delivery. This includes materials and factory labor. On-site labor is included only where YESCO performs the installation. Upon expiration of the one-year warranty, the goods are warranted solely in accordance with the manufacturer's separate warranty, if any. Electronic displays and digitally-controlled lighting products, related controllers, and similar components are warranted solely in accordance with the manufacturer's warranty, if any.

B. Service and Retrofit Services. YESCO warrants that service, repair and/or lighting retrofit services will be free from material defects in workmanship for a period of 90 days from the completion of the repair, maintenance, and/or retrofit. This includes on-site labor only; any goods are warranted solely in accordance with the manufacturer's warranty, if any. YESCO's warranties exclude damage caused by ordinary wear and tear, accident, abuse, misuse, misapplication of electricity, extreme winds or rain, hail, wildlife or rodent damage, or other casualty, unless the same is caused solely by YESCO. YESCO SPECIFICALLY DISCLAIMS ANY AND ALL OTHER WARRANTIES OF ANY TYPE, WHETHER EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO ANY IMPLIED WARRANTY OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS FOR PURPOSE. YESCO will either repair or replace, at YESCO's election, any part of the goods or services that prove to be materially defective during the warranty period, in accordance with the terms of the above warranties.

**7. Extended Warranty:** If the Work expressly includes an extended warranty for the recurring maintenance, service, or repair of goods over a term for a one-time, up-front payment or periodic payments over term, the provisions of this paragraph will apply. So long as your payment obligations are current, and you are not in default to YESCO or any YESCO affiliate under any agreement (e.g., a lease agreement), including this Agreement, YESCO agrees to service the goods only as described in the Work. When the goods require service, you agree to notify YESCO in writing, and YESCO shall, if practicable (e.g., parts are immediately available) and unless otherwise provided in this Agreement, acknowledge the request within five business days. YESCO's extended warranty obligations are inapplicable to damage for the same exclusions set forth in the limited warranty above, unless and to the extent the same is caused by YESCO. In the event that parts or materials become unavailable or in the event the goods or any components are or become unusually difficult or unsafe to access, YESCO may cancel its extended warranty obligations with respect to the affected goods or components and your exclusive remedy is for YESCO to proportionately credit any up-front payment or proportionately credit your periodic payment for the same. In the event that service is performed by a third party without the authorization of YESCO, YESCO may, at its option, suspend or terminate its extended warranty or service obligations without any credit to any up-front payment or reduction to any periodic payment upon written notice to you.

**8. Risk of Loss, Damage or Destruction; Insurance:** Except to the extent of damage caused by the negligent or otherwise wrongful acts of YESCO, you bear all risk of loss or damage to any goods, including, without limitation, loss or damage caused by seizure, casualty, vandalism, terrorism, accident, theft, riot, strike, insurrection, war, fire, and acts of God. Any shipments are FOB YESCO. Until your obligations are fully satisfied, at your sole cost and expense, you must insure any goods against loss or damage at least in the amount owed to YESCO for the Work, and you must name YESCO as loss payee with respect to such insurance.

**9. Liens and Taxes:** Until your obligations are fully satisfied, at your sole cost and expense you must maintain the Work free and clear of all levies, liens, and encumbrances. You must declare as required, and pay when due all taxes, fees, assessments, charges, and all associated penalties and interest (collectively "Assessments"). If YESCO, at its option, pays any Assessments, you must immediately reimburse YESCO for the same.

**10. Security Interest:** Until your obligations are fully satisfied, you agree that the Work and related goods are YESCO's property, free of any ownership claim by you, the owner of any adjacent realty, or the creditors of either. To secure the performance of your obligations, including, without limitation your payment obligations, you grant to YESCO a security interest in the goods and permission to perfect, assign, amend, continue, and terminate the security interest in any way allowed by applicable law, both as to personal property and as to fixtures.

**11. Default:** If you default in the payment of any amount when due, or fail to perform any other obligation in this Agreement after delivery of the Work or after YESCO is ready to perform the Work, whichever first occurs, or if at any time bankruptcy, receivership, or other insolvency proceedings are commenced by or against you or any guarantor, you will, without notice, become obligated to immediately pay to YESCO an amount equal to the sum of 1) all previously billed but unpaid amounts, and 2) all unbilled remaining amounts and other payments owed to YESCO pursuant to

any other agreement between you and YESCO or any of YESCO's affiliates. In addition, YESCO has the right to stop the Work, including, without limitation, suspending warranty obligations until YESCO is paid in full. You agree that these remedies for default are fair and reasonable compensation for the damage to YESCO resulting from your breach, and are not a penalty. YESCO's acceptance of a late payment(s) or forbearance of any other event of default shall not operate as a waiver of YESCO's rights as to any subsequent late payment(s) or any other event of default.

**12. Repossession:** If you fail to make any payment when due or otherwise default in any of your obligations in this Agreement, YESCO may terminate this Agreement and may (but has no obligation to) repossess the goods or any component(s) thereof, without resort to judicial process, and without liability for trespass. YESCO's right of repossession includes the right to remove the goods, and also to disconnect or otherwise render the goods unusable. Repossession is not an acceptance of your surrender of the goods, and shall not require patching painting, touch up, etc. afterwards. YESCO's rights of termination and repossession shall be in addition to and not as an alternative to YESCO's right to its other remedies in this Agreement and any other remedy available at law or in equity.

**13. Indemnification:** Except to the extent of YESCO's negligence or willful misconduct, you agree to indemnify, defend, and hold harmless YESCO and its officers, directors, employees, agents, and subcontractors from any and all claims, costs, expenses (including reasonable attorney's fees), damages, and liabilities, at law or in equity arising out of or related to the Work. The provisions of this paragraph shall survive the completion of the Work and/or the termination of the Agreement.

**14. Disputes:** The parties agree to use good faith efforts to resolve any claims or disputes that may arise. If unsuccessful for any reason, at YESCO's sole option and upon YESCO's written notice to you, such claims or disputes may be submitted to formal mediation, with each party to pay one-half of the costs. In the event of litigation, venue of any action shall be in Salt Lake County, State of Utah. This Agreement shall be governed and construed in accordance with Utah law, without regard to its conflict of laws provisions. YESCO shall not be liable for special, indirect, incidental or consequential damages, including lost profits, irrespective of cause or theory. If YESCO places this Agreement with a collection agency or an attorney for collection or enforcement, you must pay all costs and expenses resulting therefrom, including reasonable attorneys' fees.

**15. Possession, Transfers, and Assignment:** Until your obligations herein are fully satisfied, you must keep any goods in your sole possession and control, and will not allow the goods to be modified, relocated, removed, or otherwise tampered with in any way without YESCO's prior written consent. If you determine to sell or otherwise transfer ownership (or other rights) to your business assets, the Work, or the real property on which any goods are located, you agree to deliver to YESCO written notice of such intention at least 30 days prior to closing. At the time of closing and with proceeds therefrom, you agree to pay to YESCO all amounts then outstanding and all unbilled remaining amounts owed to YESCO, unless YESCO has previously agreed in writing to your assignment of this Agreement. All the terms and conditions hereof shall be binding upon and inure to the benefit of the successors, assigns, and legal representatives of the respective parties, including, if applicable, successors to your interest in the Work, the real property upon which any goods are located, and any successor owners of interests in any of your business assets. You may transfer your interests, rights, and obligations in this Agreement only upon the prior written consent of YESCO. YESCO may assign its interests, rights, and obligations in this Agreement as may be expedient to perform the Work.

**16. Your Special Duties:** You agree to warrant and obtain and maintain all necessary access rights (including computer access, if necessary) for YESCO to safely perform the Work on the premises for which the Work is ordered, and to disconnect, render unusable, and/or remove the Work, or any component or part thereof, free and clear of lien, encumbrance, or claim of trespass. You agree to indemnify YESCO against and hold YESCO harmless from damage or expense resulting from a breach of this provision. The Work excludes primary-side electrical and communication wiring, service, controllers (e.g., timers and photo cells), circuit breakers, and fuses. At your own expense, you agree to furnish and maintain power lines, controllers, and data service as necessary for the performance of the goods and compliance with applicable law, and agree to install the same as designated by YESCO ready and in place for connection to the goods at the intended time of installation. For Work in Colorado, connection of the goods to electrical power is excluded from the Work unless specifically described in the Agreement as an inclusion. You agree to provide all necessary reinforcements to any previously existing building, pole, base, or any other object or surface on which the goods will be installed, or which will be utilized by YESCO in the installation or access thereof, if applicable. You agree to advise YESCO in writing of all cellular antennas, microwave, and other equipment or hazards that may be dangerous to workers. YESCO's performance is subject to you properly securing or otherwise rendering safe all such dangers whenever YESCO's employees will be in the area.

You agree to bear all permitting and other compliance costs and risks pertaining to federal, state, or local laws, regulations, and ordinances or authoritative interpretations that relate to the placement, configuration, operation, and use of the goods and services. You acknowledge that outdoor advertising laws generally prohibit advertisements that are not the principal business, products, services, or activities where the advertisement is located. You agree to be solely responsible for the procurement of outdoor advertising permits (if desired) and compliance with outdoor advertising laws. You acknowledge and agree that your rights, whether arising under contract, permit from a land use authority, or otherwise, to install or operate the Work may be or become subject to revocation, limitation, suspension, condemnation, modification, restriction, or adverse interpretation by judicial, governmental agency, or other third party action. Upon the occurrence and during the pendency of any such event, you will not be released from your payment obligations under this Agreement.

## 17. Miscellaneous Provisions:

A. No statement made by YESCO's account executive(s) will be binding on YESCO unless incorporated in this Agreement in writing. Although the Agreement may be signed by YESCO's account executive(s), the Agreement shall not be binding upon YESCO for any purpose until an executive officer or another authorized agent of YESCO accepts this Agreement by providing a written signature evidencing such acceptance on the applicable Transaction Document.

B. Time is of the essence. All past due amounts shall bear an annual interest rate of the lesser of 18% percent or the maximum rate allowed by law.

C. Performance by YESCO shall be subject to delay due to strike, labor dispute, breakage, fire, unforeseen commercial delays, infectious disease, epidemic, pandemic, insurrection, war, acts of terror, acts of God, governmental regulation, or other causes beyond YESCO's reasonable control.

D. YESCO shall not be responsible for radio or television interference, nor for the replacement of light emitting diodes, neon tubing or other tubing because of color change or reduction of brilliance.

E. YESCO's listing of contractor's licenses available on the Internet at <http://www.yesco.com/licenses.html> is incorporated by reference herein.

F. If any part of this Agreement is found invalid or unenforceable, that part will be amended to achieve as nearly as possible the intent and economic effect of the original provision to the fullest extent permitted by law, and the remaining provisions shall continue in full force and effect.

G. Except for original works created by you or your agents, all designs, animations, or other advertising content (collectively, "Content") provided by YESCO is the sole property of YESCO. You warrant that you have the full legal right to use any original works created by you and delivered to YESCO by you for your use. You are granted a non-exclusive, non-transferable license to use the YESCO-owned Content for so long as you operate your business. You agree to not create derivative works of the YESCO-owned Content. YESCO may reject any request for Content that YESCO determines may reflect adversely on the character, integrity, or standing of any person or business.

This Agreement is a complete integration and final expression of the agreement between the parties, and may not be amended, supplemented, or otherwise modified except by written agreement executed by authorized representatives of each.



## Invoice

**Bill To**

Washington County School District  
121 W Tabernacle St  
Saint George UT 84770-3338  
United States

**Ship To**

Jessica Bentley  
George Washington Academy  
2277 S 3000 E  
St George UT 84790  
United States

**Remit To**

YESCO - St. George  
4679 S. River Road  
Saint George UT 84790  
United States

Project Number / Invoice #	Terms	Account Executive
PRY-46037	DUE UPON ACCEPTANCE	001111 Michael Cain

Item	Amount
<b>Down Payment Invoice for (Prefunding)</b>	
	Total

## ACH Payment Authorization

By completing your ACH information below, you authorize YESCO to withdraw all payment(s) pursuant to the Agreement on the applicable due date (s) from Customer's depository account as described below. Written revocation of this authorization must be received by YESCO with at least 30 days prior notice.

Name on Bank Account		
Name of Bank	Checking	Savings
Bank Account Number		
Routing Number	Bank City and State	
E-mail Address for Receipt		Phone
Authorized Signature		Date





**Creative Signs & Graphics**  
 2333 N 200 E  
 Spanish Fork, UT 84660  
 Ph: (801) 798- 9892  
 Email: natalie@creativesigns.com  
 Web: www.creativesigns.com

**Estimate #: 20961**  
**Option: 10mm Double Sided**

<b>Created Date:</b> 5/8/2023 3:50:31PM	<b>Prepared For:</b> George Washington Academy
<b>Salesperson:</b> Natalie Taylor	<b>Contact:</b> Jessica Bentley
<b>Email:</b> natalie@creativesigns.com	<b>Office Phone:</b> (435) 673-2232
<b>Office Phone:</b> (801) 798-9892	<b>Email:</b> jbentley@gwacademy.org
<b>Entered by:</b> Natalie Taylor	<b>Address:</b> 2277 S 3000 E St. George, UT 84790

**Description: EMC Pole Sign**

**Option: 10mm Double Sided**

	Quantity	Unit Price	Discount	Price	Subtotal
<b>1</b>	1	\$51,774.68	\$80.00	\$51,854.68	\$51,774.68
<b>Product:</b> LED Displays <b>Description:</b> LED Message Center <ul style="list-style-type: none"> <li>• 1, 53 in x 99 in x 24 in 10mm Double Cabinet</li> <li>• Cabinet</li> <li><b>Side 1: Decorated Face</b></li> <li><b>Side 2: Skin</b></li> <li>• 0, Angle Iron 2x 2 x 3/16 Vertical Dividers</li> <li>• 0, Square Tube 1.5 x 1.5 Horizontal Dividers</li> <li>• Horizontal Lamping</li> </ul>					
	Quantity		Discount	Price	
<b>1.A</b>					
<b>Product:</b> Pylons <b>Description:</b> Pylons <ul style="list-style-type: none"> <li>• 1) 14 ft Pylon / Poles</li> <li>• 22 ft Length of Iron Pipe, Sch 40, 8 in. for 14 ft stage</li> <li>• <b>FOUNDATION</b></li> <li>• 30 in diameter x 96 in deep drilled excavation</li> <li>• 1.45444104332861 cu yd</li> <li>• 2 Cu. Yds., Concrete</li> </ul>					
	Quantity		Discount	Price	
<b>1.B</b>					
<b>Product:</b> Electric Sign Installation <b>Description:</b> Installations <ul style="list-style-type: none"> <li>• Location: Customer Location: <b>2277 S 3000 E</b> <b>St. George, UT 84790</b></li> <li>• <b>1st Crew:</b> 6/5/2023</li> <li>• Crew of 2, Installation Labor</li> <li>• Equipment :1, Install Truck and 1, Drill Truck</li> <li>• <b>2nd Crew:</b> 6/5/2023</li> <li>• Crew of 2, Installation Labor</li> <li>• Equipment :1, Install Truck and 1, Drill Truck</li> </ul>					

Print Date: 5/8/2023 4:08:02PM

**Need a Sign....Get Creative!**





**Creative Signs & Graphics**

2333 N 200 E  
Spanish Fork, UT 84660  
Ph: (801) 798-9892  
Email: natalie@creativesigns.com  
Web: www.creativesigns.com

**Estimate #: 20961**

**Option: 16mm Double Sided**

Quantity	Description	Unit Price	Ext Price
1	Product: LED 16mm Double Sided Sign	\$45,259.43	\$45,259.43
	Discounts:		\$80.00
	<b>Subtotal:</b>		<b>\$45,179.43</b>
	Taxes:		\$2,828.33
	<b>Total:</b>		<b>\$48,007.76</b>
	Deposit Required:		\$24,003.88

**Notes**

Thank you for allowing us the opportunity to provide you with an estimate for your project.  
 \* Payment Terms: 50% Deposit Required at the time the order is placed - Remaining balance due upon completion of job \_\_\_\_\_  
 Initials \_\_\_\_\_  
 \* Orders over \$500.00 paid by Credit Card will incur a handling fee of 3%  
 \* Customer to provide artwork in compatible format or set-up fees may apply.  
 \* Estimate is valid for 30 days

<b>Estimate Total:</b>	\$45,259.43
<b>Discounts:</b>	\$80.00
<b>Subtotal:</b>	\$45,179.43
<b>Taxes:</b>	\$2,828.33
<b>Total:</b>	\$48,007.76
<b>Deposit Required:</b>	\$24,003.88

**Payment Terms:** Balance due upon receipt.

**Client Reply Request for Option: 16mm Double Sided**

- Estimate Accepted "As Is". Please proceed with Order.
- Changes required, please contact me.

Other: \_\_\_\_\_  
 SIGN: \_\_\_\_\_ Date: / /

**Need a Sign....Get Creative!**



**Creative Signs & Graphics**  
 2333 N 200 E  
 Spanish Fork, UT 84660  
 Ph: (801) 798- 9892  
 Email: natalie@creativesigns.com  
 Web: www.creativesigns.com

**Estimate #: 20961**  
**Option: 10mm Double Sided**

	Quantity	Discount	Price
<b>1.C</b> <b>Product:</b> Print and Cut <b>Description:</b> Graphics <ul style="list-style-type: none"> <li>• 2- 38 in x 84 in <b>Single Sided</b> Print(s) made from <b>Arlon Translucent 6500-020 54in 7 Year</b> stock material</li> <li>• Laminated with <b>Arlon 3220 Gloss 54in 7 Year</b> on face</li> </ul>			
<b>1.D</b> <b>Product:</b> Sign Cabinet <b>Description:</b> Illuminated Sign Cabinet with School Approved Graphics <ul style="list-style-type: none"> <li>• 1, 42 in x 96 in x 24 in <b>Double Sided Custom Sign Cabinet</b></li> <li>• <b>Aluminum - .040 Black 48x120 Cabinet</b></li> <li><b>Side 1: Decorated Face</b></li> <li>• 2" Standard Retainer</li> <li><b>Side 2: Skin</b></li> <li>• 2" Standard Retainer</li> <li>• LEDs include: DF Qwik Mod 3, 2, France 12V Power Supply power supply, located</li> </ul>			
<b>1.E</b> <b>Product:</b> Pole Cover (Standard Painted ) <b>Description:</b> Standard Pole Cover <ul style="list-style-type: none"> <li>• 1, 120 in x 24 in x 11 in <b>Double Sided Custom Sign Cabinet</b></li> <li>• <b>Aluminum - .063 White 48 x 120 Cabinet</b></li> <li>• Single Pole Mounted</li> <li><b>Side 1: Skin</b></li> <li><b>Side 2: Skin</b></li> <li><b>Painting</b></li> <li>• To match design Mathews, Paint System Primary Paint</li> </ul>			
<b>1.F</b> <b>Product:</b> Design <b>Description:</b> Design and Setup (Billed Hourly) <ul style="list-style-type: none"> <li>• 1 Files</li> <li>• Production preparation for all orders</li> <li>• 60 min Creative Design Time Per File.</li> </ul>			



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**Estimate #: 20961**  
**Option: 10mm Double Sided**

**Notes**

Thank you for allowing us the opportunity to provide you with an estimate for your project.  
 \* Payment Terms: 50% Deposit Required at the time the order is placed - Remaining balance due upon completion of job \_\_\_\_\_  
 Initials \_\_\_\_\_  
 \* Orders over \$500.00 paid by Credit Card will incur a handling fee of 3%  
 \* Customer to provide artwork in compatible format or set-up fees may apply.  
 \* Estimate is valid for 30 days

<b>Estimate Total:</b>	\$51,854.68
<b>Discounts:</b>	\$80.00
<b>Subtotal:</b>	\$51,774.68
<b>Taxes:</b>	\$3,306.48
<b>Total:</b>	\$55,081.16
<b>Deposit Required:</b>	\$27,540.58

**Payment Terms:** Balance due upon receipt.

**Client Reply Request for Option: 10mm Double Sided**

- Estimate Accepted "As Is". Please proceed with Order.  
 Changes required, please contact me.

Other: \_\_\_\_\_  
 SIGN: \_\_\_\_\_ Date: / /

Print Date: 5/8/2023 4:08:02PM

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 Web: www.creativesigns.com

**Estimate #: 20961**  
**Option: 16mm Double Sided**

<b>Created Date:</b> 5/8/2023 3:50:31PM	<b>Prepared For:</b> George Washington Academy
<b>Salesperson:</b> Natalie Taylor	<b>Contact:</b> Jessica Bentley
<b>Email:</b> natalie@creativesigns.com	<b>Office Phone:</b> (435) 673-2232
<b>Office Phone:</b> (801) 798-9892	<b>Email:</b> jrbentley@gwacademy.org
<b>Entered by:</b> Natalie Taylor	<b>Address:</b> 2277 S 3000 E St. George, UT 84790

**Description: EMC Pole Sign**

**Option: 16mm Double Sided**

	Quantity	Unit Price	Discount	Price	Subtotal
<b>1</b> <b>Product:</b> LED Displays <b>Description:</b> LED Message Center <ul style="list-style-type: none"> <li>• 1, 53 in x 99 in x 24 in 16mm Double Cabinet</li> <li>• Cabinet</li> <li><b>Side 1: Decorated Face</b></li> <li><b>Side 2: Skin</b></li> <li>• 0, Angle Iron 2x 2 x 3/16 Vertical Dividers</li> <li>• 0, Square Tube 1.5 x 1.5 Horizontal Dividers</li> <li>• Horizontal Lamping</li> </ul>	1	\$45,179.43	\$80.00	\$45,259.43	\$45,179.43

	Quantity	Discount	Price
<b>1.A</b> <b>Product:</b> Pylons <b>Description:</b> Pylons <ul style="list-style-type: none"> <li>• 1) 14 ft Pylon / Poles</li> <li>• 22 ft Length of Iron Pipe, Sch 40, 8 in. for 14 ft stage</li> <li>• <b>FOUNDATION</b></li> <li>• 30 in diameter x 96 in deep drilled excavation</li> <li>• 1.45444104332861 cu yd</li> <li>• 2 Cu. Yds., Concrete</li> </ul>			

	Quantity	Discount	Price
<b>1.B</b> <b>Product:</b> Electric Sign Installation <b>Description:</b> Installations <ul style="list-style-type: none"> <li>• Location: Customer Location: 2277 S 3000 E St. George, UT 84790</li> <li>• 1st Crew: 6/5/2023</li> <li>• Crew of 2, Installation Labor</li> <li>• Equipment :1, Install Truck and 1, Drill Truck</li> <li>• 2nd Crew: 6/5/2023</li> <li>• Crew of 2, Installation Labor</li> <li>• Equipment :1, Install Truck and 1, Drill Truck</li> </ul>			





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 Spanish Fork, UT 84660  
 Ph: (801) 798- 9892  
 Email: natalie@creativesigns.com  
 Web: www.creativesigns.com

**Estimate #: 20961**  
**Option: 16mm Double Sided**

		Quantity	Discount	Price
<b>1.C</b>	<b>Product:</b> Print and Cut			
	<b>Description:</b> Graphics <ul style="list-style-type: none"> <li>• 2- 38 in x 84 in Single Sided Print(s) made from Arlon Translucent 6500-020 54in 7 Year stock material</li> <li>• Laminated with Arlon 3220 Gloss 54in 7 Year on face</li> </ul>			
<b>1.D</b>	<b>Product:</b> Sign Cabinet			
	<b>Description:</b> Illuminated Sign Cabinet with School Approved Graphics <ul style="list-style-type: none"> <li>• 1, 42 in x 96 in x 24 in Double Sided Custom Sign Cabinet</li> <li>• Aluminum - .040 Black 48x120 Cabinet</li> <li><b>Side 1: Decorated Face</b></li> <li>• 2" Standard Retainer</li> <li><b>Side 2: Skin</b></li> <li>• 2" Standard Retainer</li> <li>• LEDs include: DF Qwik Mod 3, 2, France 12V Power Supply power supply, located</li> </ul>			
<b>1.E</b>	<b>Product:</b> Pole Cover (Standard Painted )			
	<b>Description:</b> Standard Pole Cover <ul style="list-style-type: none"> <li>• 1, 120 in x 24 in x 11 in Double Sided Custom Sign Cabinet</li> <li>• Aluminum - .063 White 48 x 120 Cabinet</li> <li>• Single Pole Mounted</li> <li><b>Side 1: Skin</b></li> <li><b>Side 2: Skin</b></li> <li><b>Painting</b></li> <li>• To match design Mathews, Paint System Primary Paint</li> </ul>			
<b>1.F</b>	<b>Product:</b> Design			
	<b>Description:</b> Design and Setup (Billed Hourly) <ul style="list-style-type: none"> <li>• 1 Files</li> <li>• Production preparation for all orders</li> <li>• 60 min Creative Design Time Per File.</li> </ul>			



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**Estimate #: 20961**  
**Option: 16mm Double Sided**

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**Estimate #: 20961**  
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Initials  
\* Orders over \$500.00 paid by Credit Card will incur a handling fee of 3%  
\* Customer to provide artwork in compatible format or set-up fees may apply.  
\* Estimate is valid for 30 days

<b>Estimate Total:</b>	\$45,259.43
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<b>Taxes:</b>	\$2,828.33
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<b>Deposit Required:</b>	\$24,003.88

**Payment Terms:** Balance due upon receipt.

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Other: \_\_\_\_\_  
SIGN: \_\_\_\_\_ Date: / /

Print Date: 5/8/2023 4:08:02PM

**Need a Sign....Get Creative!**

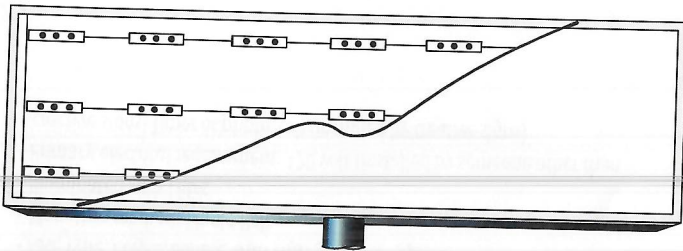


**SPECIFICATIONS FOR FABRICATION AND INSTALLATION:**

- Internally illuminated cabinet built to UL specifications
- Retainer size: 2"
- Face type: Polycarbonate with vinyl graphics applied
- Mounting method: Single Pole
- Illuminated with LED's
- Primary electrical requirement: 120 volt (installed by someone other than creative signs) Timer or photo-cell (installed by creative signs)

**LED MESSAGE CENTER SPECIFICATIONS**

- Full Color LED Displays



**ELECTRICAL NOTES**  
 Sign Company DOES NOT provide primary electrical to sign  
 Power to the sign must be done by a licensed electrical contractor or licensed electrician.  
 Each sign must have:  
 1. A minimum of one dedicated 120V 20A circuit  
 2. Junction box installed within 6 feet of sign  
 3. Three wires: Line, Ground, Neutral



**JOB NAME:**

George Washington Academy

**INSTALL ADDRESS:**

2277 S 3000 E  
 St. George, UT 84790

**BILLING ADDRESS:**

2277 S 3000 E  
 St. George, UT 84790

**CONTACT NAME:**

Jessica Bentley

**PHONE:**

(435) 673-2232

**DATE:**

2-22-2023

**DESIGN NUMBER:**

**SALES PERSON:**

Natalie

**DESIGNER:**

Storm

THIS DRAWING WAS CREATED TO ASSIST YOU IN VISUALIZING OUR PROPOSAL AND CANNOT BE COPIED OR REVISED IN ANY FORM. THE ORIGINAL IDEAS HEREIN ARE THE EXCLUSIVE PROPERTY OF CREATIVE SIGN & GRAPHICS. DRAWING IS REPRESENTATIONAL ONLY. SCALE, SIZING AND COLOR MAY VARY. REFER TO PROPOSAL FOR EXACT SPECIFICATIONS

**CUSTOMER APPROVAL:**

X

**SALES PERSON SIGNATURE:**

X

**DATE:**

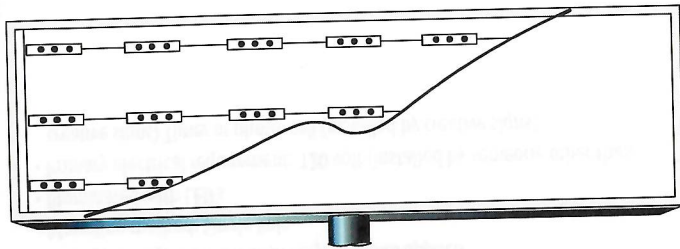


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**SALES PERSON SIGNATURE:**

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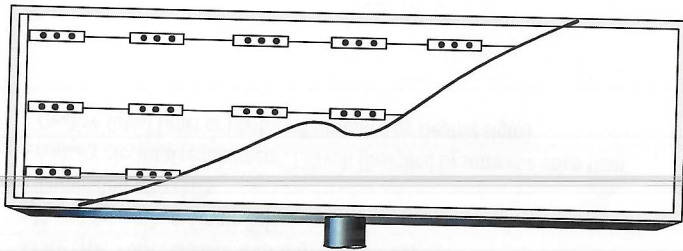
**DATE:** \_\_\_\_\_

**SPECIFICATIONS FOR FABRICATION AND INSTALLATION:**

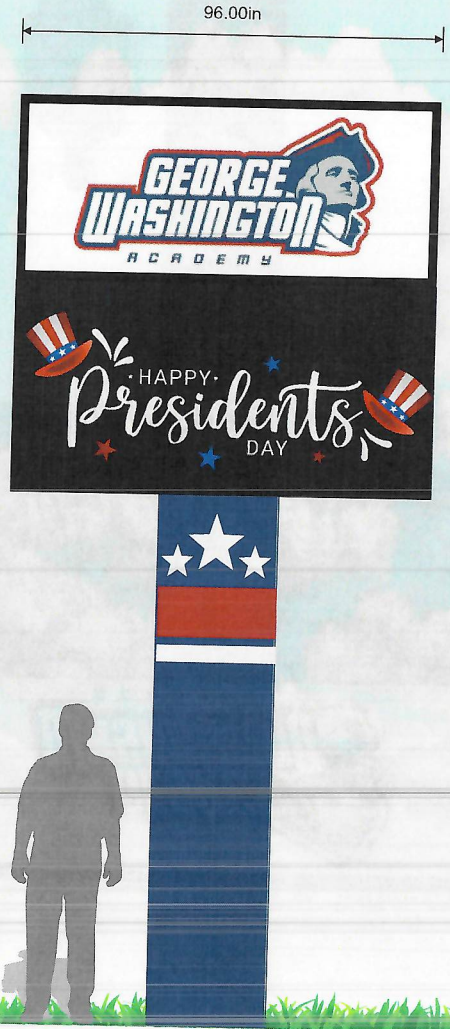
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**DATE:**



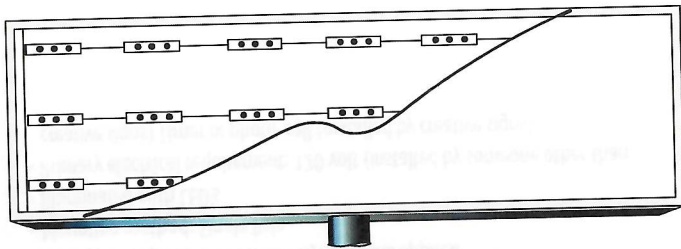
George Washington Academy

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- Full Color LED Displays



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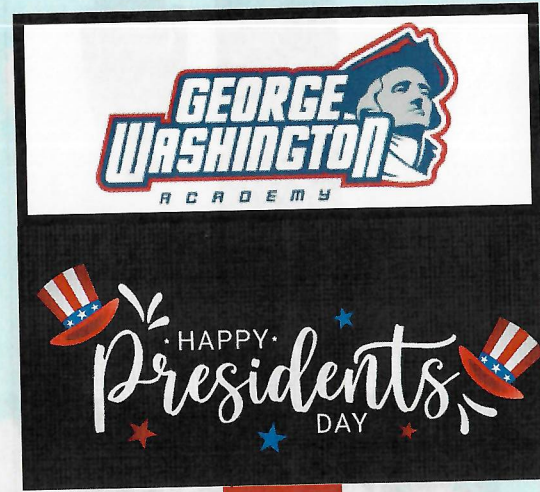
1. A minimum of one dedicated 120V 20A circuit
2. Junction box installed within 6 feet of sign
3. Three wires: Line, Ground, Neutral

120.00in

48.00in

60.00in

120.00in



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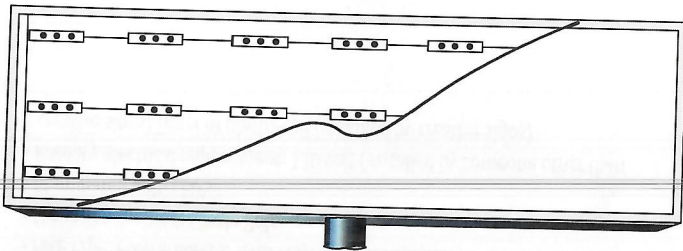


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**LED MESSAGE CENTER SPECIFICATIONS**

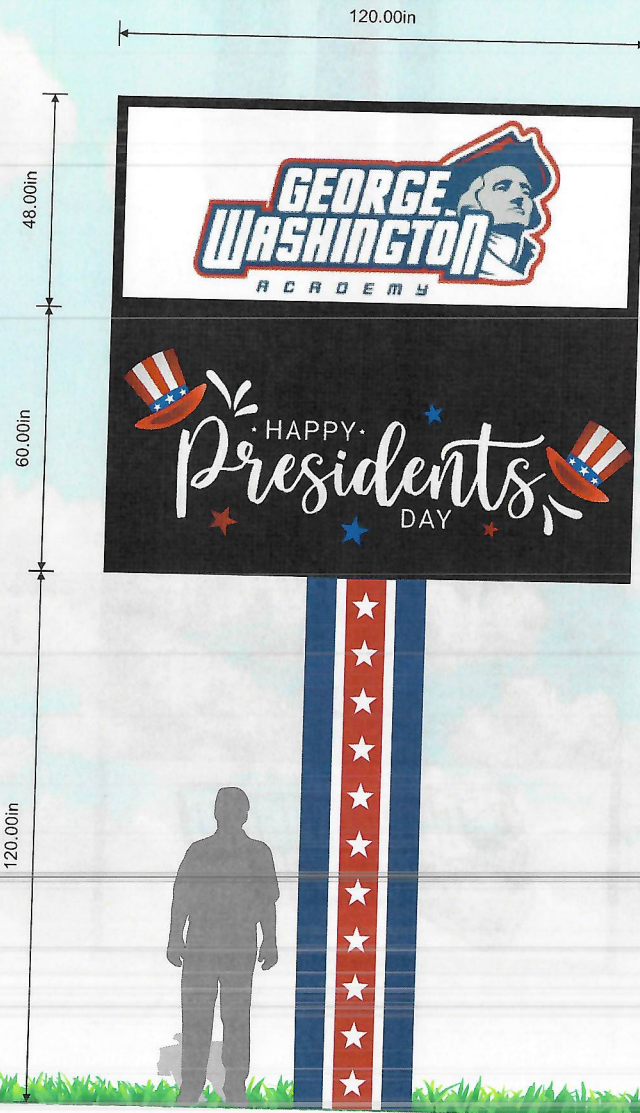
- Full Color LED Displays



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801-798-9892

Contractor License number: 8146985-5501



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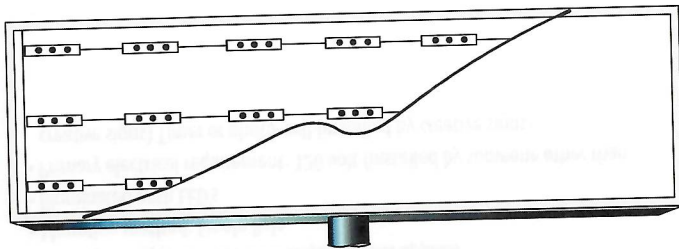
George Washington Academy

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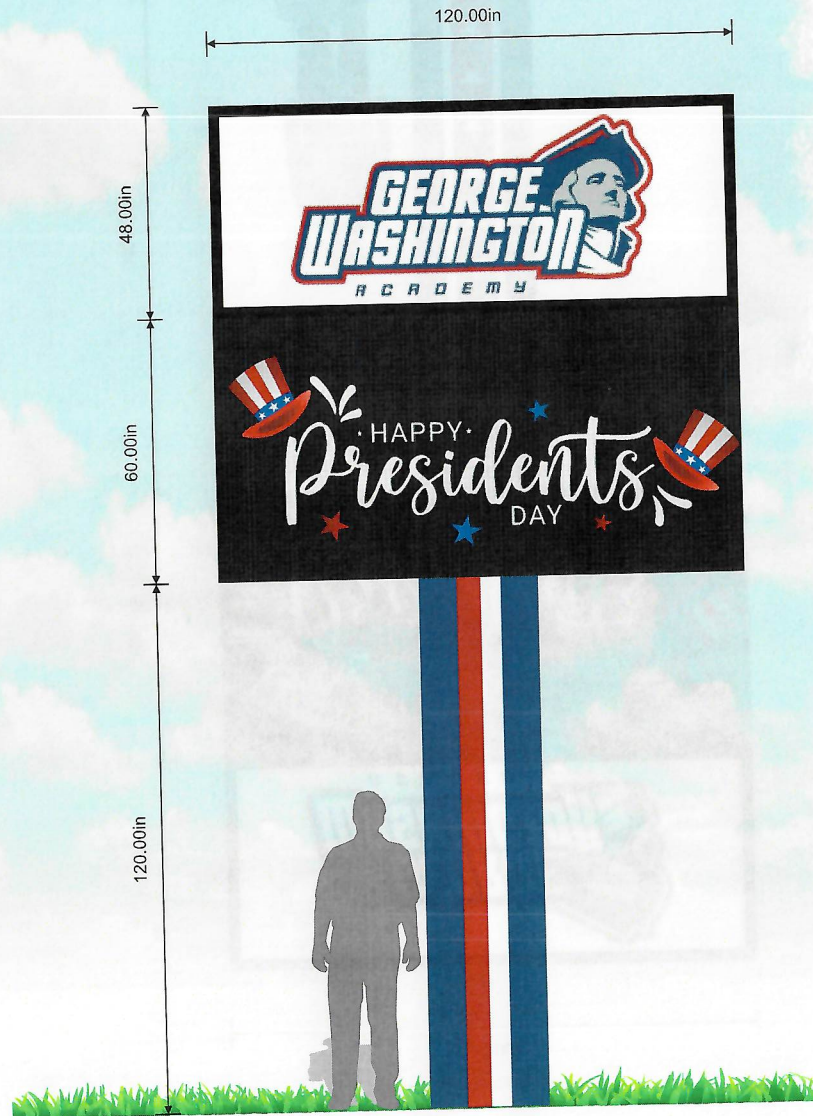
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2-22-2023

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**SALES PERSON:**  
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**CUSTOMER APPROVAL:**  
X \_\_\_\_\_

**SALES PERSON SIGNATURE:**  
X \_\_\_\_\_

**DATE:** \_\_\_\_\_



## Rainbow Sign & Banner

181 East Riverside Drive  
 St. George, UT 84790  
 Ph: (435) 628-5107  
 FAX: (435) 628-0499  
 Email: info@rainbowsign.net  
 Web: https://rainbowsign.net

# ESTIMATE

## Estimate #: 106418

<b>Created Date:</b> 5/11/2023 8:38:07PM	<b>Prepared For:</b> George Washington Academy
<b>Salesperson:</b> Steven Davis	<b>Contact:</b> Jessica Bentley, Purchasing Secretary
<b>Email:</b> steve@rainbowsign.net	<b>Office Phone:</b> (435) 673-2232 x507
<b>Office Phone:</b> (435) 628-5107	<b>Fax:</b> N/A
<b>Cell Phone:</b> (435) 862-7612	<b>Email:</b> jbentley@gwacademy.org
<b>Entered by:</b> Steven Davis	<b>Address:</b> 2297 South 3000 East St. George, UT 84790

### Description: PYLON SIGN WITH OPTEC MESSAGE CENTER

	Quantity	Unit Price	Subtotal	Tax	Total
<b>1</b> Product: Pylon Sign	1	\$19,586.16	\$19,586.16	\$1,308.57	\$20,894.73
Description: CUSTOM PYLON SIGN WITH INSTALLATION AS PER PLANS					
Qty 1, 54 in (H) x 144 in (W) x 30 in Double Sided Custom Sign					

	Quantity	Unit Price	Subtotal	Tax	Total
<b>2</b> Product: LED Message Center	1	\$18,218.00	\$18,218.00	\$1,212.84	\$19,430.84
Description: Double Face, Color LED Message Center with the following: 16mm pitch, 45 x 195 matrix (up to 6 lines of 4.4" characters) Wireless ethernet communications Complete installation and software training 5 year parts and 1 year labor warranty					

Note: Customer must provide computer with Windows operating system and Primary Power to the sign (120 volt, 20 amps)

Quantity: 1  
 Side(s): Double Sided  
 Product Code: Message Center  
 Height: 29 in Width: 123 in

	Quantity	Unit Price	Subtotal	Tax	Total
<b>3</b> Product: Installation	1	\$8,563.99	\$8,563.99	\$324.54	\$8,888.53
Description: Installation of pylon sign and message center on direct buried pipe in landscaping area Includes engineering, pipe and concrete foundation					

	Quantity	Unit Price	Subtotal	Tax	Total
<b>4</b> Product: Excavation	1	\$1,901.00	\$1,901.00	\$0.00	\$1,901.00
Description: Estimated Excavation and dirt removal					

\*This is an estimate only, difficult excavation may result in additional time ie: exceptionally rocky soil or solid bedrock.  
 \*\*We are not responsible for damage to irrigation lines or wiring when installing signs in landscaped areas





**Rainbow Sign & Banner**

181 East Riverside Drive  
St. George, UT 84790  
Ph: (435) 628-5107  
FAX: (435) 628-0499  
Email: info@rainbowsign.net  
Web: https://rainbowsign.net

**ESTIMATE**  
Estimate #: 106418

**Notes**

Most prices valid for 30 days - Steel or Aluminum estimates valid for 5 days due to market volatility.  
Please note, a credit card convenience fee of 2% will be added to payments over \$3000

<b>Subtotal:</b>	\$48,269.15
<b>Taxes:</b>	\$2,845.95
<b>Total:</b>	\$51,115.10
<b>Deposit Required:</b>	\$25,557.55

**Payment Terms:** Net 15 - Thank You...We appreciate your business!  
Payments are due within 15 days of order completion or additional interest of 1.5% per month will be assessed.  
Please note, a credit card convenience fee of 2% will be added to payments over \$3000

**Client Reply Request**

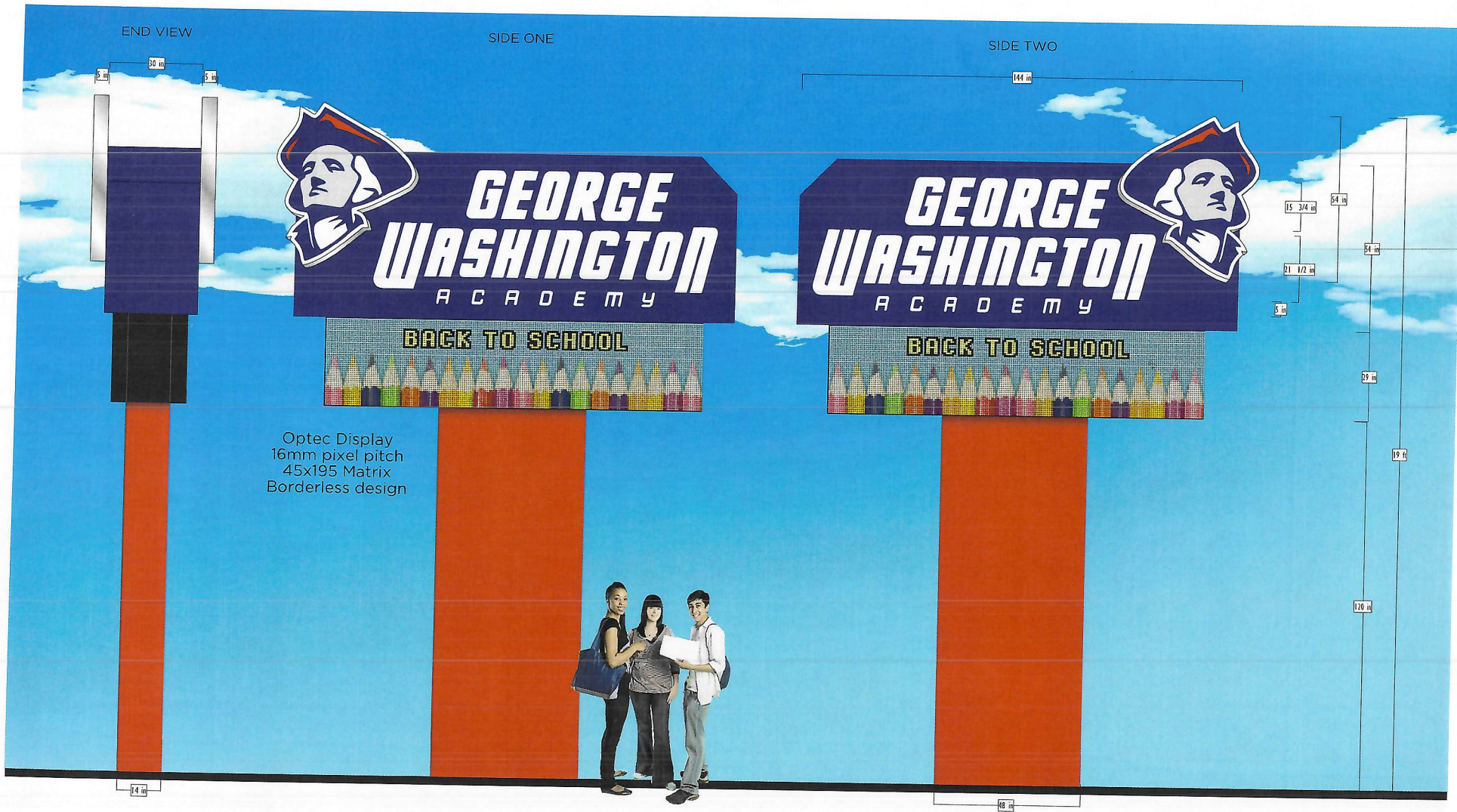
- Estimate Accepted "As Is". Please proceed with Order.
- Changes required, please contact me.

Other: \_\_\_\_\_  
SIGN: \_\_\_\_\_ Date: / /

Print Date: 5/15/2023 12:50:29PM

Tax ID: 87-0532380





Furnish and install one (1), double face pylon sign with the following specifications:

- Aluminum exterior with steel structure - Internal LED illumination
- Dimensional GW mascot with brushed aluminum sides, white acrylic face & 3M translucent vinyl graphics
- Cabinet sign with routed aluminum face and white acrylic show thru letters reading George Washington Academy
- Full color, 16mm, electronic message center with 5 year parts and 1 year labor warranty

COLORS RENDERED HERE MAY NOT REPRESENT THE ACTUAL FINISH - REFER TO COLOR CALL-OUTS FOR APPROVED COLOR SPECIFICATIONS

RAINBOW SIGN & BANNER © 2023  
ALL RIGHTS RESERVED



PROJECT NAME  
& LOCATION:

SALESPERSON: Steve Davis

DESIGNER: Steve Davis

CUSTOMER APPROVAL & DATE

LANDLORD APPROVAL & DATE

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THE ORIGINAL IDEAS HEREIN ARE THE EXCLUSIVE PROPERTY OF RAINBOW SIGN & BANNER UNTIL TRANSFERRED BY SALE



Star Sign Inc  
 1060 E. Tabernacle St St. George, UT 84770  
 sales@starsignonline.com  
 1-435-628-7806

www.starsignonline.com



# Quote 29436

## Message Center's with Original Logo

SALES REP INFO  
 Carter Smith  
 carter@starsignonline.com

QUOTE DATE  
 05/03/2023  
 QUOTE EXPIRY DATE  
 06/02/2023

TERMS  
 COD

ORDERED BY  
 George Washington Academy

CONTACT INFO  
 Jessica Bentley  
 jbentley@gwacademy.org  
 +1 435-673-2232

#	ITEM	QTY	UOM	U.PRICE	TOTAL (EXCL. TAX)	TAX
1	<b>Design -</b>					
2	<b>Double Sided w/ Contour Logo</b> 10mm Full-Color Display	1	Each	\$100.00	\$100.00	\$0
3	<b>Double sided w/ square logo can</b> 10mm Full-Color Display	1	Each	\$34,206.00	\$34,206.00	\$0
4	<b>Footings and Install</b> Customer is responsible for Drawing Power and Internet to the proposed location of the sign before Installation.	1	Each	\$28,991.00	\$28,991.00	\$0
		1	Each	\$7,000.00	\$7,000.00	\$0

SIGNATURE:

DATE:

OPTION 1 - Letters kerned and W & N are larger (Original)



OPTION 2 - Letters kerned and all the same size



1060 East Tabernacle  
St. George, UT 84770  
435.628.7806  
www.starsignonline.com

CLIENT NAME | George Washington Academy

ADDRESS |

CITY/STATE/ZIP CODE | St. George, Utah

SALES REPRESENTATIVE | Carter | [carter@starsignonline.com](mailto:carter@starsignonline.com)

PROJECT MANAGER | Carter | [carter@starsignonline.com](mailto:carter@starsignonline.com)

DESIGNER | Justin

SHEET DESCRIPTION

Logo Design Options

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SHEET





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 St. George, UT 84770  
 435.628.7806  
 www.starsignonline.com

CLIENT NAME | George Washington Academy

ADDRESS |

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SALES REPRESENTATIVE | Carter | carter@starsignonline.com

PROJECT MANAGER | Carter | carter@starsignonline.com

DESIGNER | Justin

SHEET DESCRIPTION

Monument Sign - Option 1 - Location A

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1090 East Tabernacle  
St. George, UT 84770  
435.629.7806  
www.starsignonline.com

CLIENT NAME | George Washington Academy

ADDRESS |

CITY/STATE/ZIP CODE | St. George, Utah

SALES REPRESENTATIVE | Carter | [carter@starsignonline.com](mailto:carter@starsignonline.com)

PROJECT MANAGER | Carter | [carter@starsignonline.com](mailto:carter@starsignonline.com)

DESIGNER | Justin

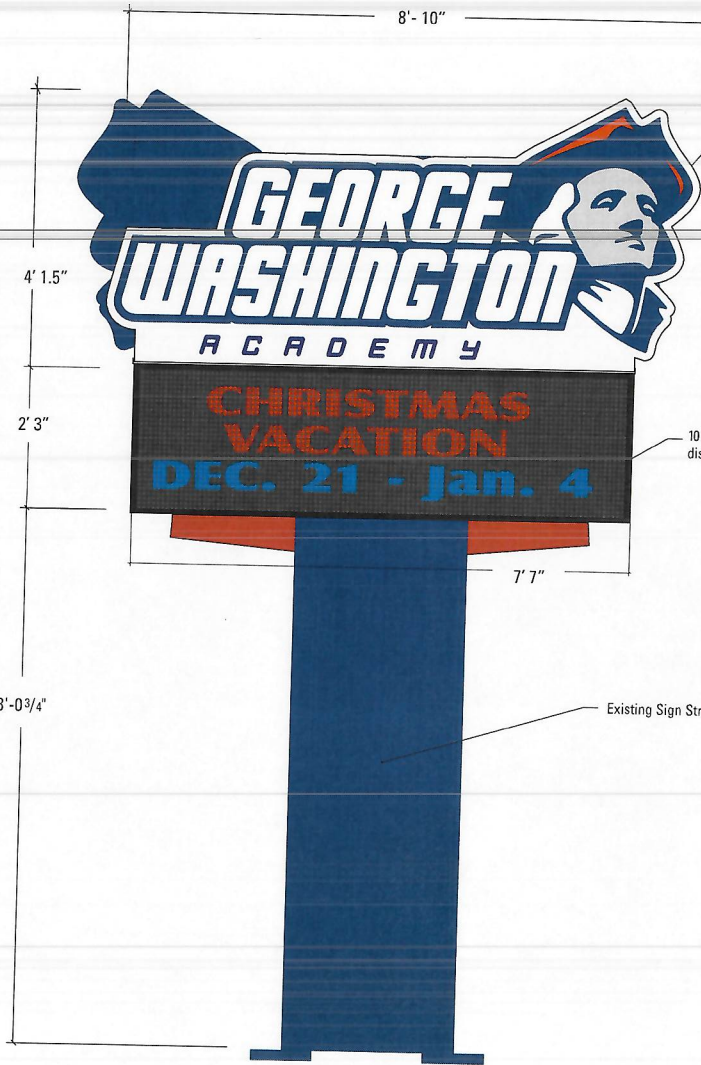
SHEET DESCRIPTION

Monument Sign - Option 2 - Location A

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St. George, UT 84770  
435.628.7806  
www.starsignonline.com

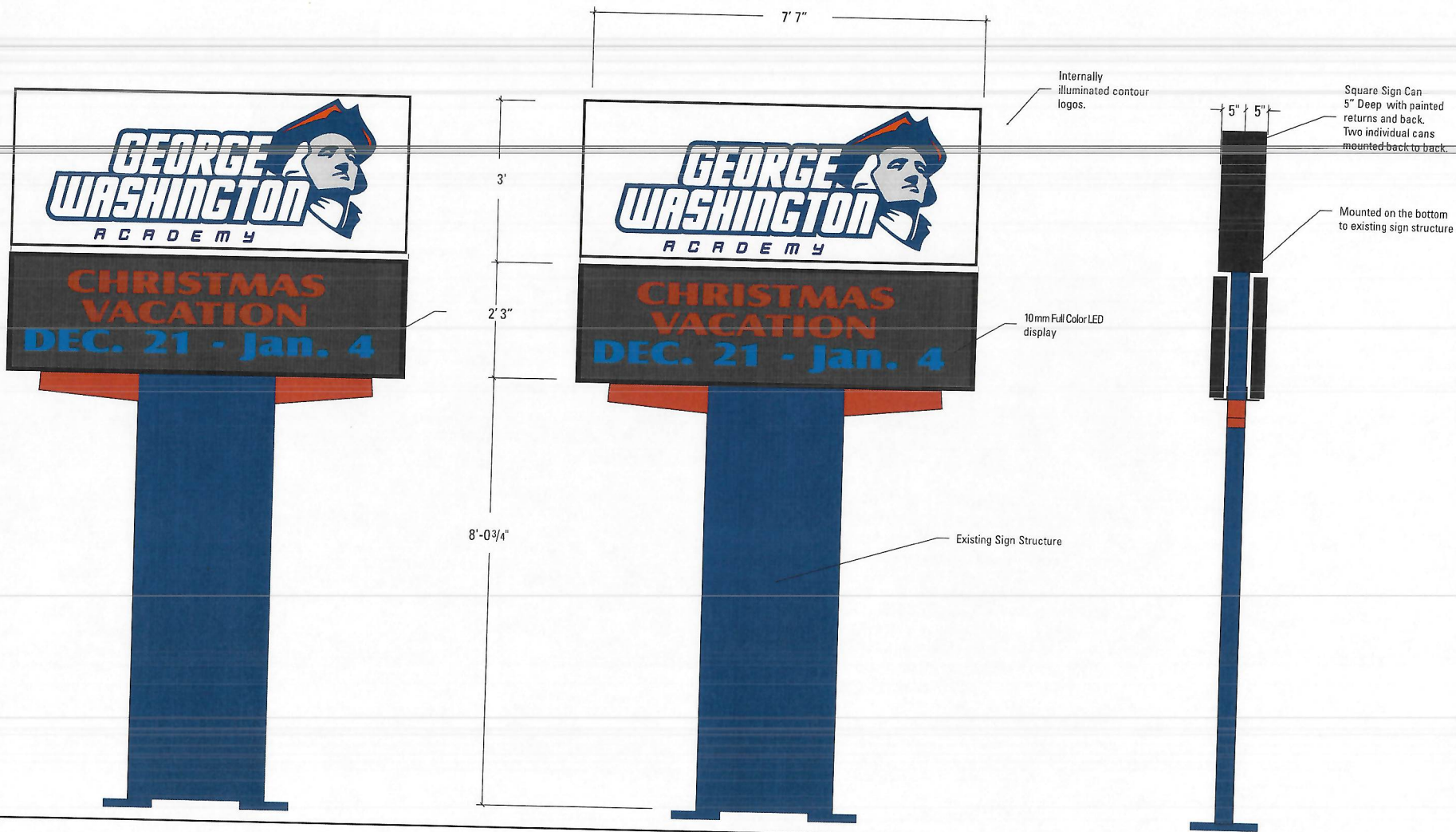
CLIENT NAME | George Washington Academy  
ADDRESS |  
CITY/STATE/ZIP CODE | St. George, Utah

SALES REPRESENTATIVE | Carter | carter@starsignonline.com  
PROJECT MANAGER | Carter | carter@starsignonline.com  
DESIGNER | Justin

SHEET DESCRIPTION  
Monument Sign - Option 2

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SHEET



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 St. George, UT 84770  
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 CITY/STATE/ZIP CODE | St. George, Utah

SALES REPRESENTATIVE | Carter | carter@starsignonline.com  
 PROJECT MANAGER | Carter | carter@starsignonline.com  
 DESIGNER | Justin

SHEET DESCRIPTION  
 Monument Sign - Option 1

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SHEET



## PROPOSAL FOR BOARD ACTION

**Proposal Title:** Roof Repair - Project #1 - Old part of the building

**Submitted by:** Steve Erickson

**Originating Committee:** Campus Management

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

### **Situation:**

The school was built in 2005/2006 and the roof needs to be repaired.

### **Background Information, including a list of reviewing committees:**

We have had multiple areas of the roof leaking and it needs to be replaced.

Campus Management  
Finance

### **Assessment:**

### **Recommendation:**

The Campus Management recommends moving forward with Project #1 which is the oldest part of the building. The Campus Management looked at each company without looking at the amount of the bid and feel that any one of them could do the job.

It is the recommendation of the Finance Committee to accept the quote from Hirschi Roofing and Insulation for the amount of \$125,312.00 since they are the lowest quote for this project.

Please submit this form with all accompanying paperwork to the Board Secretary, Deborah Odenwalder, at [dodenwalder@gwacademy.org](mailto:dodenwalder@gwacademy.org) by the 15<sup>th</sup> day of the month of the Board meeting.

# HIRSCHI ROOFING AND INSULATION

1030 E Commerce Dr Unit 400  
 Saint George, UT 84790  
 Office 435-673-6667  
 Fax 435-674-5217 ?

Residential and Commercial  
**SINCE 1993**

5/8/2023

**Customer** George Washington Academy  
**Address** 2277 S 3000 E  
**City,St** St.George UT, 84790  
**Phone** 673-2232  
**Email**  
**Contact**  
**Salesperson**

**Roof Pitch**  
**Job Name** over main entrance  
**Plan Bid set**  
**Address**  
**Phone**  
**Job Super**  
**Subdivision**  
**Lot #**

**Our bid is for labor and material to install a new 60 mill tpo over the existing tpo.**

- 1- Remove cap metal from parapet walls**
- 2- Remove existing tpo from parapet walls, around a/c curbs and sky lights.**
- 3- Install new insulfoam over existing tpo
- 4- Install mechanically fastened Genflex 60 mill tpo membrane over insulfoam.  
 Complete with tpo pipe flashings, Screws, plates  
 to fasten both insulfoam and tpo membrane to the roof deck.
- 5- Install new tpo up all parapet wall's and a/c curbs complete with bonding adhesive.
- 6- Reinstall cap metal with urethane caulk on all laps.
- 7- Haul all debris to the washington county land field

**Genflex Has A Twenty Year Material Warranty**

**Base Estimate \$125,312**

Our bid reflects the current pricing as of today. Due to the volatility of the market, any price increases we receive from manufacturers and or distributors after the original bid date will be **added to the bid, submitted, accepted, and signed by the customer before we order and or schedule the job.**

Insatall eve riser if the framer did not raise the fascia for flat tile ADD \$ -

Disclaimer: This communication may contain privileged and/or confidential information. It is intended solely for the use of the addressee.

If you are not the intended recipient, you are strictly prohibited from disclosing, copying, distributing or using any of this information.

Snow removal is not included in our bid and will be billed out at \$45 dollars an hour per man.

This offer expires if not signed and accepted by both parties within 10 days after the date listed at the top of this agreement.

Terms: Net 30 days from invoice date; 2% finance charges on balance unpaid after 30 days(26.8% annum) Customer agrees to pay all costs and expenses of collection

We use prgress billing for all services and may require a deposit to begin work.

Accepted Date \_\_\_\_\_

Approved Date \_\_\_\_\_

Company Name \_\_\_\_\_

By \_\_\_\_\_

By \_\_\_\_\_

\_\_\_\_\_

Signature

Signature

Date



# HIRSCHI ROOFING AND INSULATION

Residential and Commercial  
**SINCE 1993**

1030 E Commerce Dr Unit 400  
Saint George, UT 84790  
Office 435-673-6667  
Fax 435-674-5217 ?

5/8/2023

**Customer** George Washington Academy  
**Address** 2277 S 3000 E  
**City,St** St.George UT, 84790  
**Phone** 673-2232  
**Email**  
**Contact**  
**Salesperson**

**Roof Pitch**

**Job Name** North West and Library section  
**Plan Bid set**  
**Address**  
**Phone**  
**Job Super**  
**Subdivision**  
**Lot #**

**Our bid is for labor and material to install a new 60 mill tpo over the existing tpo.**

- 1- Remove cap metal from parapet walls**
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  - 3- Install new insulfoam over existing tpo
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Complete with tpo pipe flashings, Screws, plates  
to fasten both insulfoam and tpo membrane to the roof deck.
  - 5- Install new tpo up all parapet wall's and a/c curbs complete with bonding adhesive.
  - 6- Reinstall cap metal with urethane caulk on all laps.
  - 7- Haul all debris to the washington county land field
- Genflex Has A Twenty Year Material Warranty**

**Base Estimate \$98,688**

Our bid reflects the current pricing as of today. Due to the volatility of the market, any price increases we receive from manufacturers and or distributors after the original bid date will be **added to the bid, submitted, accepted, and signed by the customer before we order and or schedule the job.**

Insatall eve riser if the framer did not raise the fascia for flat tile ADD \$ -

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Accepted Date \_\_\_\_\_

Approved Date \_\_\_\_\_

Company Name \_\_\_\_\_

By \_\_\_\_\_

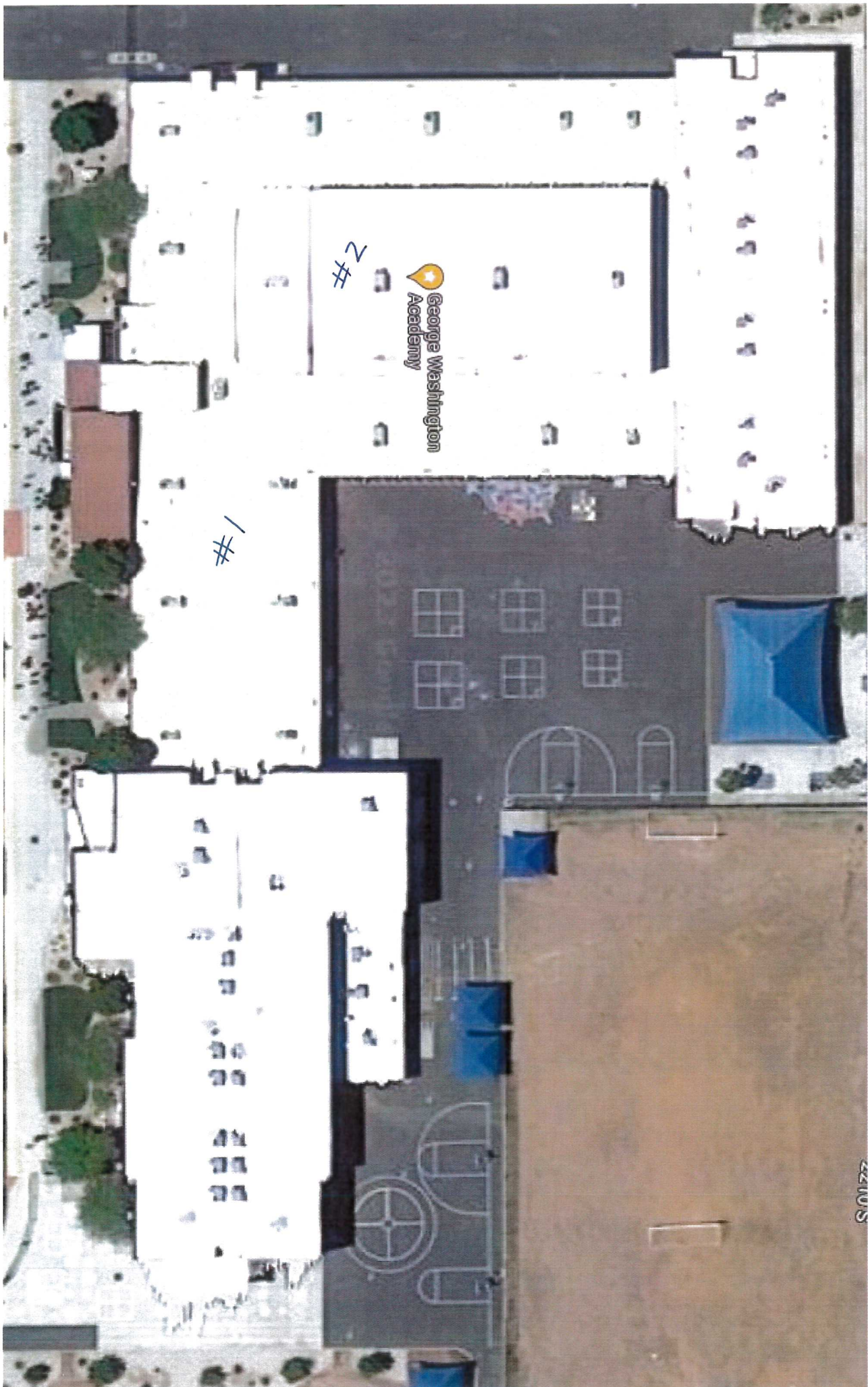
By \_\_\_\_\_

By \_\_\_\_\_

Signature

Signature

Date



George Washington  
Academy

#2

#1

24105



## PROPOSAL FOR BOARD ACTION

**Proposal Title:** Estabilsh formal Audit Committee and appoint members

**Submitted by:** Casey Unrein

**Originating Committee:** Policy and Finance

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

### **Situation:**

As reviewed in prior Board meeting, the State has implemented new requirements for having a formal audit committee and displaying that information on the website.

We've created a guiding document for the role of the Audit Committee and need to appoint members.

### **Background Information, including a list of reviewing committees:**

### **Assessment:**

### **Recommendation:**

Approve Audit Committee description and appoint two (2) members given that we only have six (6) Board members currently.

Please submit this form with all accompanying paperwork to the Board Secretary, Deborah Odenwalder, at [dodenwalder@gwacademy.org](mailto:dodenwalder@gwacademy.org) by the 15<sup>th</sup> day of the month of the Board meeting.

## Audit Committee

### **Purpose:**

The Audit Committee is formed to meet state regulations and to assist the Board in the oversight of both the internal and external audit functions.

### **Formation:**

GWA Board will form an Audit Committee and approve their positions annually.

The Audit Committee will consist of:

- Board members:
  - If GWA has seven or more Board members, then three Board members of the board must serve on the audit committee.
  - If an LEA has six or fewer Board members, then two Board members of the board must serve on the audit committee.
  - However, at no point shall there be so many Board members on the committee that a meeting would constitute a quorum.
- Other members
  - The Committee may include members of the community, if those members bring experience with audit, finance and accounting, legal, or compliance backgrounds.
  - See restrictions below in “Independence.”

The membership duties of the GWA Audit Committee include the following:

- Good Faith – Perform their duties in good faith, in a manner they reasonably believe to be in the best interests of the Committee and the school with such care as a generally prudent person in a similar position would use under similar circumstances.
- Independence – An individual may not serve on an audit committee if he or she:
  - Is employed by the entity (other than governing board members).
  - Currently provides, or within the prior two years, has provided, goods or services to the entity.
  - Is a family member of an employee or officer.
  - Is the owner of or has a direct and material interest in a company providing goods or services to the entity.
- Confidentiality – During the exercise of duties and responsibilities, the Committee members may have access to confidential information. The Committee shall have an obligation to GWA to maintain the confidentiality of such information.

## **Role and Duties:**

The Committee will complete the following duties:

- Initiate internal, external and ad hoc audits, compliance activities, and operations management reviews as deemed necessary to ensure appropriate risk management and control processes.
- Meet with external auditors, internal audit directors, and compliance officers as deemed necessary to discuss specific risk management and control issues.
- Provide the Board with relevant information obtained from ongoing reviews of auditing, compliance, and operations activities and reports of internal auditors, external auditors, and the State Auditor's Office.
- Manage the RFP process related to external auditors.
- Recommend the external auditors for review and approval by the Board.
- Oversee all internal and external auditing and compliance functions within the school.
- Hold regularly scheduled meetings and report on activities to the Board

## **Decision-Making Process**

All decisions shall be reached by vote of a simple majority of the total membership of the committee. A quorum constitutes a simple majority of the total membership and meetings will not be conducted unless a quorum is present.

## **Reporting Requirements**

The GWA Audit Committee has the duty and responsibility to report its activities to the Board as needed, but not less than annually. Periodic written reports of Audit Committee activities are an important communication link between the Audit Committee and the Board on key decisions and responsibilities. The Audit Committee's reporting requirements are to:

- Report on the scope and breadth of committee activities so that the Board is kept informed of its work.
- Provide minutes or a summary of minutes of meetings which clearly record the actions and recommendations of the Committee.
- Report on their review of GWA's draft annual audit report and accompanying management letter and their review of significant findings.
- Report on suspected fraud, waste or abuse, or significant internal control findings and activities of the internal control function.
- Report on indications of material or significant non-compliances with laws or GWA policies and regulations.
- Report on any other matters that the committee believes should be disclosed to the Board.