

Title: School Fees and Fee Waiver

Effective Date: November 14, 2017

References:

Utah Administrative Rule R277-407, *School Fees*

Purpose

The purpose of this policy is to permit the orderly establishment of a system of reasonable fees, while prohibiting practices that would exclude those unable to pay from participation in school-sponsored activities; to provide adequate notice to students and families of fees and fee waiver requirements; and to establish school money collection and accounting procedures.

Definitions

1. "Fee" means any charge, deposit, rental, or other mandatory payment, however designated, whether in the form of money or goods. Admission fees, transportation charges, and similar payments to third parties are fees if the charges are made in connection with an activity or function sponsored by or through a school. For purposes of this policy, charges related to the National School Lunch Program are not fees.
2. "Provision in lieu of fee waiver" means an alternative to fee payment or waiver of fee payment. A plan under which fees are paid in installments or under some other delayed payment arrangement is not a waiver or provision in lieu of fee waiver.
3. "Student Supplies" means items which are the personal property of a student which, although used in the instructional process, are also commonly purchased and used by persons not enrolled in the class or activity in question and have a high probability of regular use in other than school-sponsored activities. Student supplies include: pencils, papers, notebooks, crayons, scissors, basic clothing for healthy lifestyle classes, and similar personal or consumable items over which a student retains ownership. Student supplies does not include items such as the foregoing for which specific requirements such as brand, color, or a special imprint are set in order to create a uniform appearance not related to basic function.
4. "Optional Project" means a non-mandatory project chosen and retained by a student, for which the student covers the cost or provides the materials, in lieu, or in addition to a mandatory classroom project otherwise available to the student which would require only school-supplied materials.
5. "Textbook" means a book, workbook, or materials similar in function, which are required for participation in a course of instruction.
6. "Waiver" means a release from the requirement of payment of a fee and from any provision in lieu of fee payment.

### Policy

Under the direction of the IEA Board of Directors, the Director is appointed to administer this policy and to do so fairly, objectively, without delay or discrimination, avoiding stigma and unreasonable burdens on students and parents/guardians who may be unable to pay fees.

### **School Fees**

1. School fees ("Fees") include charges or assessments for the following:
  - a. materials, textbooks, and supplies; and
  - b. Costumes, clothing, and accessories (other than items of typical student dress) which are required for school attendance, participation in choirs, pep clubs, drill teams, athletic teams, bands, orchestras, and other student groups, and expenditures for student travel as part of a school team, student group, or other school-approved travel .
2. School fees do not include charges or assessments for the following:
  - a. class rings, letter jackets, school photos, yearbooks and similar items not required for participation in a class or activity; and
  - b. charges related to the National School Lunch Program such as food or milk.

### **General Provisions**

1. No fee may be charged in connection with any class or school-sponsored or supported activity, including extracurricular activities, unless the fee has been set and approved by the Board of Directors and distributed in an approved fee schedule.
2. Fee schedules and policies shall be adopted at least annually in a regularly-scheduled public meeting of the Board of Directors.
  - a. The Board will make provision for broad public notice and participation in the development of the fee schedule and waiver policy.
  - b. Minutes of the board meeting during which the fee and waiver schedule and waiver policy is adopted, together with copies of the approved policy, shall be kept on file and made available upon request.
2. The Director shall establish and implement procedures to ensure that the parent/guardian of each student receives written notice of all current and applicable fee schedules and fee waiver policies, including procedures for obtaining waivers and for appealing a denial of a waiver application. Copies of fee schedules and fee waiver policies shall be included with registration materials provided to potential or continuing students.
3. IEA may pursue reasonable methods to collect fees but shall not exclude students from school or withhold official student records including written or electronic grade reports or transcripts for failure to pay fees.
4. While IEA may solicit and accept donations or contributions, no donation may be required in order to participate in any class or activity. Donations and contributions are strictly voluntary. A

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donation is a fee if a student must make a donation in order to participate in an activity. No student may be excluded from an activity or program because they did not make a donation.

5. Fees are non-refundable.

### **Classes and Activities During the Regular School Day**

Students may be required to provide materials for optional projects, which may not be required as a condition for enrolling in or completing a course. Project-related courses shall be based on projects and experiences that are free to all students.

1. No fee may be charged in kindergarten through sixth grade for materials, textbooks, supplies or for any class or regular school day activity including assemblies and field trips.
2. If a class is established or approved which requires payment of fees or purchase of items in order for students to participate fully and to have the opportunity to acquire skills and knowledge required for full credit and highest grades, the fees or costs for the class shall be subject to the fee waiver provisions of Utah Administrative Code R277-407-6. 2.1.4.
3. Students at any grade level may be required to provide materials or pay for an optional projects, but a student may not be required to select an optional project as a condition for enrolling in or completing a course. A school shall base mandatory course projects on experiences that are free to all students.
4. School supplies must be provided for elementary students.
  - a. An elementary school or teacher may compile and provide to a student's parent a suggested list of supplies for use during the regular school day so that a parent may furnish on a voluntary basis those supplies for student use.
  - b. Such a list must include the following language: "Notice: The items on this list will be used during the regular school day. They may be brought from home on a voluntary basis. Otherwise, they will be furnished by the school."
  - c. Secondary students may be required to provide their own student supplies, subject to the provisions of section 2.1.7.
  - d. Students of all grade levels may be required to replace supplies provided by the school which are lost, wasted or damaged by the student through careless or irresponsible behavior.

### **School Activities Outside of the Regular School Day**

1. Fees may be charged in connection with any school-sponsored activity, which does not take place during the regular school day, regardless of the age or grade level of the student, if participation is voluntary and does not affect a student's grade or ability to participate fully in any course taught during the regular school day. Such fees are subject to the fee waiver requirement.

2. Fees related to an extracurricular activity sponsored by IEA may not exceed limits established by the Board.
3. A school shall collect fees for school-sponsored activities consistent with IEA policies and state law.
4. Activities that use school facilities outside the regular school day and are not sponsored by IEA may require fees (i.e., programs or activities sponsored by the parent-teacher organization and/or an outside organization). Fee waivers are not available for such fees

#### **Fee Waivers**

1. To ensure that no student is denied the opportunity to participate in a class or school-sponsored or supported activity because of an inability to pay a fee, IEA provides fee waivers or other provisions in lieu of fee waivers for eligible students.
2. The procedure will include the following:
  - a. The Director will review and grant waiver requests.
  - b. The process for obtaining a fee waiver or pursuing an alternative shall be administered fairly, objectively, without delay, and in a manner that avoids stigma, embarrassment, undue attention, and unreasonable burdens on students and parents.
  - c. The Director will inform patrons of the process for obtaining a fee waiver or pursuing alternatives through the use of standardized IEA fee waiver application and alternative fee payment forms.
  - d. Students receiving a fee waiver or provisions in lieu of a fee waiver shall not be treated differently from other students or identified to students, staff members, or other persons who do not need to know of the waiver.
  - e. Fee waivers or other provisions in lieu of a fee waiver shall be available to any student whose parent is unable to pay a fee.

#### Eligibility

1. A fee waiver is available to any student whose parent/guardian is unable to pay the fee in question. Eligibility is established by providing any one or more of the following:
  - a. income verification such as income tax returns or current pay stubs;
  - b. benefit verification letter from the Social Security Administration for a student receiving Supplemental Security Income (only the student who receives the SSI benefit qualifies for fee waivers);
  - c. letter of decision from the Utah Department of Workforce Services covering the period for which the fee waiver is sought for a family receiving TANF (currently qualified for financial assistance or food stamps); or
  - d. the youth in custody required intake form or school enrollment letter provided by the case worker from the Utah Division of Child and Family Services or the Utah Juvenile Justice Department for a student in state custody or foster care.

2. Case-by-case determinations may be made for those who do not qualify under one of the foregoing standards but who, because of extenuating circumstances, are not reasonably capable of paying the fee. For all school fees other than for textbooks, a partial fee waiver or other provisions in lieu of a fee waiver may be permitted. Such other provisions may include but not be limited to (a) providing tutorial assistance to other students, (b) providing assistance before or after school to teachers and/or other school personnel *on school-related matters*, and (c) general community or home service.
3. Fee waiver eligibility documentation is not required annually but maybe required at any time by the school or a parent may ask for review for good cause.
  - a. For the protection of privacy and confidentiality schools shall not retain required fee waiver verification documents.
  - b. If a student is eligible for a fee waiver, textbook fees must be waived; no work alternative is permissible. A student may however, be offered a work alternative to a fee waiver for all other kinds of fees.
  - c. If a parent or guardian of a fee waiver eligible student asks to pay fees in installments instead of having all or part of the fees waived, an alternative method of payment can be arranged for everything but textbook fees.

#### Appeals

1. Denial of eligibility for a fee waiver may be appealed in writing to the Director within ten (10) school days of receiving a notice of denial.
  - a. IEA shall contact the parent/guardian within two (2) weeks after receiving the appeal and schedule a meeting with the Director to discuss the parent/guardian's concerns.
  - b. If, after meeting with the Director, the fee waiver is still denied, the parent/guardian may appeal, in writing, within ten (10) school days of receiving a second notice of denial to the Board of Directors, whose determination is final.
2. Any requirement that a student pay a fee will be suspended during any period in which the student's eligibility for a fee waiver is being determined or during the time a denial of fee waiver is being appealed.

#### Provisions in Lieu of a Fee Waiver

1. The Director may require fee waiver eligible students to perform a work assignment or public service as payment-in-kind in lieu of a fee waiver.
2. Work or service alternatives must be administered according to the following guidelines:
  - a. The student given work alternatives should not be treated differently from other students or identified to persons who do not need to know.
  - b. The work should be appropriate to the age, abilities, and situation of the student and should not create an unreasonable burden on the student or parents.
  - c. The work should be a fair exchange of time for the value of fees to be waived.

- d. Parents are to be given the opportunity to review proposed alternatives to fee waivers.

#### Items Eligible for a Fee Waiver

1. Any charge, deposit, rental, or other mandatory payment for student participation in any class, program, or activity, provided, sponsored, or supported by or through IEA, are fees requiring approval of the Board, and are subject to the fee waiver requirement.
2. Expenditures for uniforms, costumes, clothing and accessories, other than items of typical student dress, which are required for school attendance or participation in school activities, and expenditures for student travel as part of a school team, student group, or other school-approved travel, are fees requiring approval of the Board, and are subject to the fee waiver requirement.
3. Any school implementing a mandatory school uniform policy shall work with staff, businesses, service organizations, retailers, and parents to ensure that appropriate provisions are made for students of limited means. No student shall be denied attendance at school, penalized academically or otherwise subject to disciplinary measures for failing to wear a required school uniform by reason of financial hardship.

#### Items not Subject to Fee Waivers

1. The requirements of fee waiver and availability of other provisions in lieu of a fee waiver do not apply to:
  - a. Charges for class rings, letter jackets, school photos, yearbooks, and similar articles not required for participation in a class or activity.
  - b. Student supplies for secondary students as long as the item is something which is commonly found in students' homes regardless of wealth.
  - c. Charges assessed pursuant to a student's damaging or losing school property. In accordance with § Utah Code Ann. §53G-8-212, students of all grade levels may be required to replace any school property which has been lost or willfully cut, defaced, or otherwise damaged, the school may withhold the issuance of an official written grade report, diploma, or transcripts of the student responsible for the damage or lost until the student or the student's parent or guardian has paid for the damages.
    - i. Students shall be given notice and an opportunity to pay fines prior to withholding issuance of official written grade reports, diplomas, and transcripts.
    - ii. If the student and the student's parent or guardian are unable to pay for damages or if it is determined by the school in consultation with the student's parent or guardian that the student's interests would not be served if the parent or guardian were to pay for the damages, the school may provide for a program of work the student may complete in lieu of the payment. A general breakage fee levied against all students in a class or school is not permitted.

#### Student Records

1. A school may pursue reasonable methods for collecting student fees, but shall not, as a result of unpaid fees:

- a. exclude students from school;
  - b. refuse to issue a course grade; or
  - c. withhold official student records including written or electronic grade reports, diploma, or transcripts.
2. A school may withhold the official student records of a student responsible for lost or damaged school property consistent with this policy, but may not withhold any records required for student enrollment or placement in a subsequent school.
  3. Consistent with Utah Code §53G-6-604, a school requested to forward a certified copy of a transferring student’s record to the new school shall comply within thirty (30) school days of the request.

ProRated Fee Schedule

1. Students enrolling after the scheduled registration date shall pay fees using the following schedule.

<u>Initial Date of Entry Fee Payment Schedule</u>	<u>New Students Enrollment Fee Payment Rate</u>
<u>Prior to mid-term of term one.</u>	<u>100%</u>
<u>Following mid-term of term one and prior to mid-term of term two.</u>	<u>75%</u>
<u>Following mid-term of term two and prior to mid-term of term three.</u>	<u>50%</u>
<u>Following mid-term of term three and prior to mid-term of term four.</u>	<u>25%</u>
<u>After mid-term of term four.</u>	<u>No payment required</u>

**Refunds**

1. IEA shall refund fees according to the following procedures:
  - a. Schools shall not issue cash refunds.
  - b. Refunds to students may be withheld to pay for fines or other monies owed by the withdrawing or transferring student.
  - c. Appeals shall be heard by the school Director.
  - d. Refunds shall be based on the schedule outlined in this policy.

Refunds for Students Transferring Within or Leaving the District

1. All secondary students who withdraw from school shall be refunded all unused fees as directed in table [A] and [B] of this section.

Table A: Fee Refund Schedule	
Date of Withdrawal	Refund Rate of Fee
Prior to mid-term of term one.	100%
Following mid-term of term one and prior to mid-term of term two.	75%
Following mid-term of term two and prior to mid-term of term three.	50%
Following mid-term of term three and prior to mid-term of term four.	25%
After mid-term of term four.	No refund
[B] Refund Schedule for Other Fees and Charges	
Fee or Charge	Conditions for Refund
Extracurricular group uniform and other program costs	No refund after the program session start date.
Locker Fees	No refund
Computer Equipment	No Refund
Class Fees	Refund according to refund rate in Table A

**School Collections and Accounting Procedures**

1. School Collections
  - a. Responsibility of the Director.
    - i. It is the duty and responsibility of the school director to ensure that all student fees and other funds receipted and deposited by staff assigned to their location are collected in compliance with the authorized fee schedule and financial policies as approved by the Board of Education.
    - ii. Monies Shall Be Collected by Authorized Personnel Only

- iii. All monies for fees, lockers, student supplies, optional projects, picture books, year books, clinics, uniforms, etc. are to be collected following this policy and District guidelines using authorized staff only.
  1. All money collected is to be deposited in the bank daily, if practicable, but no later than once every three banking days.
  2. No money is to be collected by unauthorized staff, teachers, teaching assistants, or coaches unless authorized by the director.
- iv. Schools may collect PTO dues at the time student fees are collected with registration. All PTO dues must be immediately credited to designated PTO accounts in the school's computer system and kept separate from all other school funds.
- v. In the collection of school fees, schools must comply with statutes and State Tax Commission rules regarding the collection of state sales tax.

### **School Accounting Procedures**

1. To insure fiscal responsibility and integrity, each school shall maintain the following procedures.
  - a. Segregation of Accounting Duties
    - i. All duties associated with the collection, accounting or disbursement of funds shall, if possible, be segregated such that no one person shall have authority in more than one area.
    - ii. Specifically, those who receive funds shall not have authority to pay or authorize for payment any invoice without written approval by a separate individual.
    - iii. The authority to issue checks shall be held by one who does not receive funds.
2. Check Cashing Policies
  - a. Checks may be accepted up the amount of purchase.
  - b. Two-party checks shall not be accepted or cashed under any circumstance.
3. Receipting
  - a. All monies received shall be receipted via the designated payment management system at the time the funds pass from patron control to school control and be deposited in the bank at the end of each business day, if practicable, but no later than once every three banking days.
  - b. When collecting un-receipted cash, (i.e. vending, pencil machines, field trip donations, etc. )two people shall be present to collect and account for the monies.

### Sources used in preparation of this policy

Mountain West Montessori Academy, Fee Waiver Policy

Date originally approved: November 14, 2017

Attest:

Board Chair/President

Board Secretary

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Signature

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Signature

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Printed Name

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Printed Name