

**SWAN RIVER MONTESSORI CHARTER SCHOOL**  
**School Board Meeting**  
**Tuesday, February 18, 2025 at 2:30 p.m.**

The school board will hold this meeting in person at Swan River Montessori Charter School at 503 Maple St. building.

**Meeting Agenda**

**I. CALL TO ORDER at 503 Kitchen at Swan River Montessori Charter School by @ pm**

**II. ROLL CALL**

- a. Board Members Present:
- b. Board Members Absent:
- c. Other Attendees:
- d. Recording Minutes :

**III. REVIEW OF SRMCS MISSION AND VISION STATEMENTS**

The mission of Swan River Montessori Charter School is to provide a child-centered environment for self-directed and personalized learning in a small, community-based public school with an emphasis on the natural environment.

Swan River Montessori Charter School's vision is to employ an interdisciplinary approach to education by teaching the whole child (heart, mind, and soul). The Montessori learning environment is designed to foster this whole child approach by meeting the child's inherent needs of self-discovery, creativity, independence, and competence. Swan River Montessori Charter School will create a kind, respectful environment where each child has a sense of belonging. Learning at Swan River Montessori Charter School involves the student, the student's family, the teachers, and the larger community. Swan River supports family and community participation in each child's education by utilizing and appreciating community resources and the natural world as a learning environment.

**IV. MEETING AGENDA-** Motion to approve meeting agenda made by , Seconded by Board Vote- All "aye", Motion carries

**V. DECLARATION OF CONFLICTS-**

**VI. FINANCIAL REPORT**

- a. January Financial Report –Motion to approve January financials made by Seconded by Board Vote- All "aye" Motion carries
  
- a. FY25 Enrollment Numbers as of 2.12.25
  - i. Charter School (K-6) = 167
  - ii. Children's House (EC) = 13
  - iii. Pupil Unit Actual/Budget = 167/163
  
- b. Review of Bills-
- c. Donations- – no donations to approve

**VII. CONSENT AGENDA -** Motion to approve consent agenda removing Bullying Prohibition Policy by ,  
Seconded by . Board Vote- all aye, motion carries

- a. January Minutes
- b. Fixed Assets Policy
- c. Nepotism Policy
- d. Public and Private Personnel Data

**VIII. ENVIRONMENTAL EDUCATION REPORT AS RELATED TO CONTRACTED GOAL**

**IX. ACADEMIC PERFORMANCE REPORT AS RELATED TO CONTRACTED GOALS –**

**X. DIRECTOR GOALS-**

**XI. TRATEGIC PLANNING & GOAL SETTING-**

**XII. OLD BUSINESS-**

- a. Harassment and Violence Policy
- b. Policy Services by MN School Boards Association – They will not prorate. Director suggests to wait until July
- c. Proposed FY26 transportation/dismissal time change

**XIII. NEW BUSINESS**

Review Assumptions and Preliminary Numbers for Upcoming Budget Year

**XIV. REVIEW OF NEXT MEETING AGENDA**

- a. Date, Time & Location of next Board Meeting – **March 18, 2025 in the 503 building @ 2:30 pm**
- b. Upcoming Agenda Items

New Business

Approve School Calendar for Next Year  
Confirm Auditor Contract  
Prepare for Elections  
Compensation for Substitute Teachers & Support Staff Policy

**XV. MOTION TO ADJOURN** by at PM , Seconded by . Board Vote- all in favor ‘ aye’ , motion carries



# Swan River Montessori Monthly Financials

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JANUARY 2025

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FINANCE AND ACCOUNTING SERVICES FOR CHARTER  
SCHOOL AND EDUCATION SUPPORT ORGANIZATIONS

# Swan River Montessori Financial Highlights

## JANUARY 2025

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### Balance Sheet:

The School's balance sheet reflects the school's liquid assets and liabilities. The primary focus of the balance sheet is the cash balance and any material liabilities. Additionally, attention should be paid to the amount of the YTD state hold back. The highlights from the balance sheet are:

- \$770,065 Cash balance at end of the month
- \$165,817 State receivables which represents an initial estimate for the beginning of the accrual for the FY24 hold back
  
- \$5,449 State receivables which represents the remaining amount due to the school from the state 10% holdback of the prior school year
- \$99,285 Salary and benefits payables estimated. This is for summer salaries as of month-end.

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### Income Statement

The focus of the school's income statement is to monitor the ongoing revenues and expenses of the various programs. A monthly review of the actual spent vs. budget as well as taking into consideration the percentage of the fiscal year completed is imperative. Yet, also understanding how each individual line-item functions will help the overall analysis. The highlights from the income statement are:

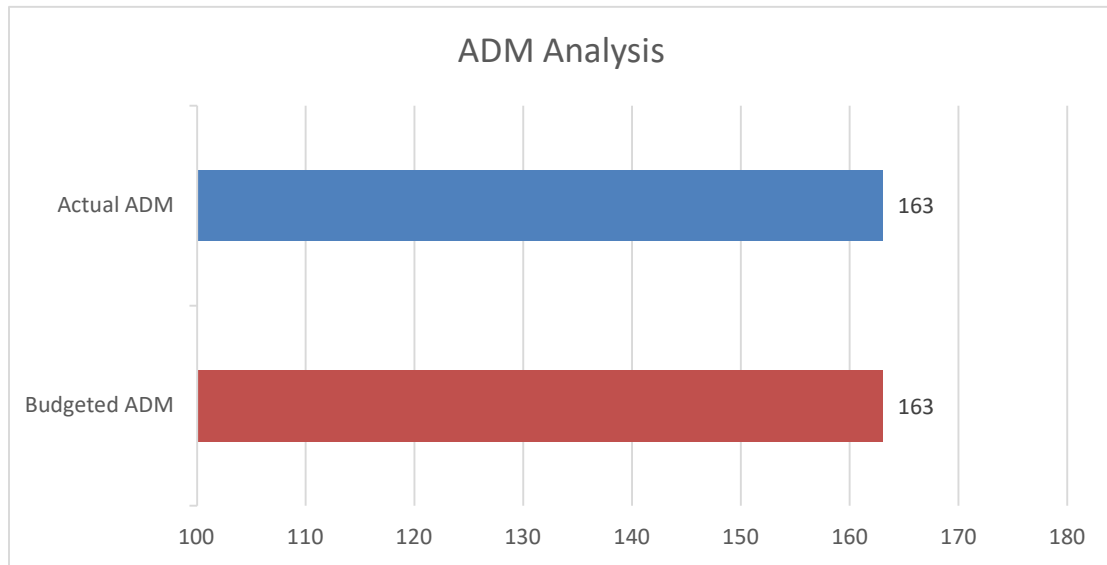
- Adopted Budget: 163 ADM
- Revised Budget: 163 ADM
- Actual ADM 163
- 58% Percent of the fiscal year completed
- 54% YTD revenue as a percent of budget based on the revised budget.
- 51% YTD expenses as a percent of budget based on the revised budget.
- \$794,447 Projected year end fund balance
- 31% Projected ending fund balance as a % of expense budget

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### Cash Flow:

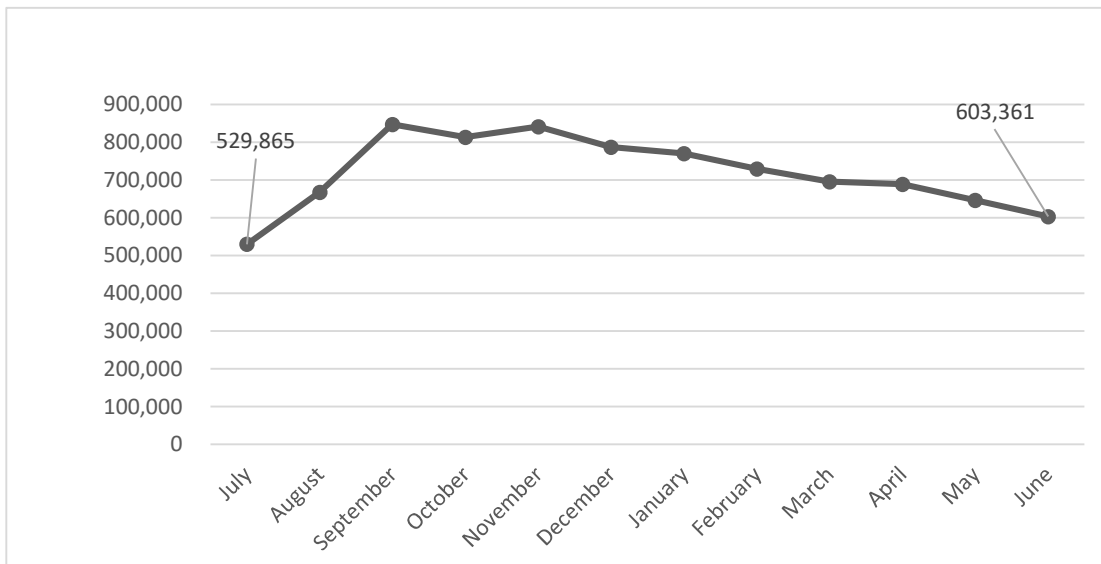
- Estimated cash balance as of June 30, 2025  
\$ 603,361

## Enrollment/ADM's



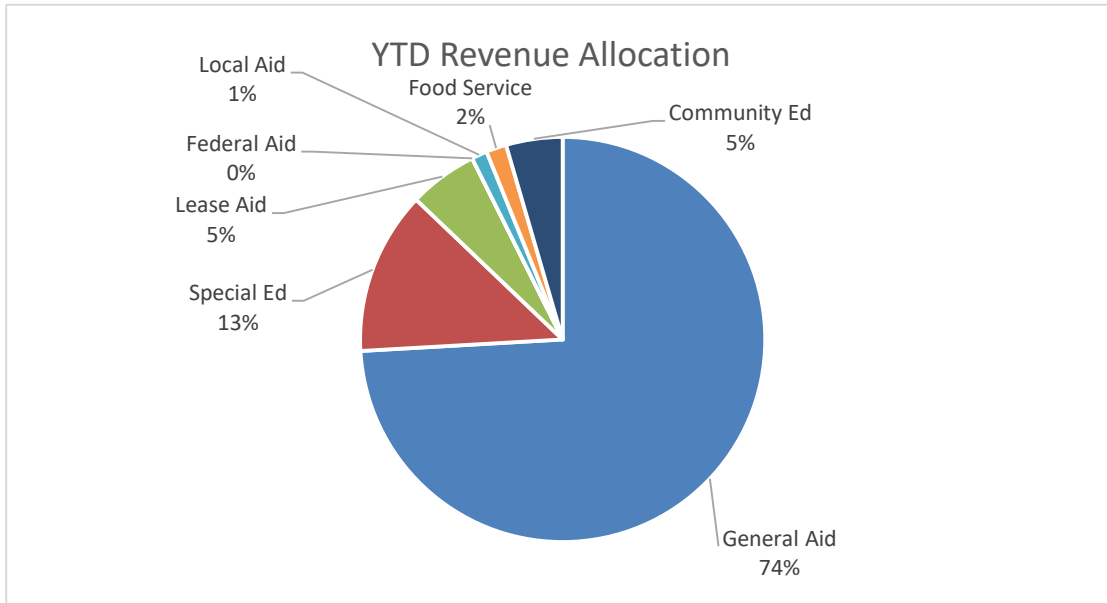
Monitoring the school's budgeted ADM vs. the actual ADM is one of the most important analytical revenue reviews. Variance from the budgeted ADM must be reviewed and understood.

## Cash Flow Projection



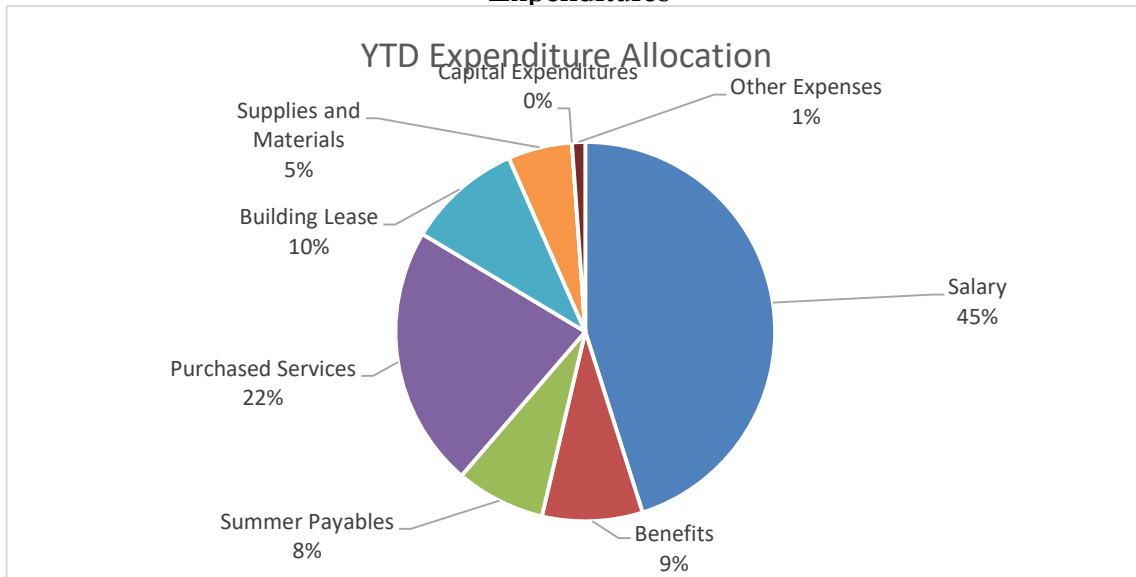
Swan River's cash balance is expected to decrease slightly during fiscal 2024.

## Revenue



The graph above reflects the revenue allocation the school has received from all revenue sources to date.

## Expenditures



The graph above reflects the current year to date expenditure allocation across the school's major budget categories. This depiction helps identify how the school has spent their funds thus far.

**Swan River Montessori Charter School**  
**Balance Sheet**  
**As of January 31, 2025**

<b>Assets</b>	<b>As of Month-End</b>	
Cash		770,065
MDE Receivable - Current year estimate		165,817
MDE Receivable - Prior year		5,449
Federal Receivable		-
Total Assets	\$	941,331
<b>Liabilities</b>		
Salary and Benefits Payable	\$	99,285
Accounts Payable		280
Total Liabilities	\$	99,565
<b>Fund Balance</b>		
Beginning - Audited	\$	737,684
Change in Fund Balance		104,082
Ending- Projected	\$	841,766
Total Liabilities and Fund Balance	\$	941,331

*\*\*Current year based on estimated, primarily for ADM numbers.\*\**

**Swan River Montessori Charter School**  
**Income Statement Summary**  
**As of January 31, 2025**

<b>Revenue</b>	<b>Adopted Budget - 163ADM/ 163PU</b>	<b>Working Forecast - 163ADM/ 163PU</b>	<b>Monthly Activity</b>	<b>Year to Date</b>	<b>% of Budget</b>
State Aids	\$ 2,474,328	\$ 2,474,328	\$ 165,826	\$ 1,358,291	54.9%
Federal Aids	48,668	48,668	4	15,908	32.7%
Local	103,725	103,725	5,643	53,654	51.7%
<b>Total</b>	<b>\$ 2,642,819</b>	<b>\$ 2,642,819</b>	<b>\$ 171,472</b>	<b>\$ 1,427,853</b>	<b>54.0%</b>
<b>Expense</b>					
Salary	\$ 1,207,336	\$ 1,207,336	\$ 116,967	\$ 597,224	49.5%
Benefits	275,914	275,914	22,087	113,331	41.1%
Summer Payables	-	-	-	100,862	NA
Purchased Services	579,909	579,909	27,642	295,062	50.9%
Supplies and Materials	231,368	231,368	14,004	72,466	31.3%
Capital Expenditures	253,380	253,380	16,532	129,884	51.3%
Other Expenses	38,149	38,149	9,805	14,942	39.2%
<b>Total</b>	<b>\$ 2,586,056</b>	<b>\$ 2,586,056</b>	<b>\$ 207,037</b>	<b>\$ 1,323,772</b>	<b>51.2%</b>
<b>Change in Fund Balance</b>	<b>\$ 56,763</b>	<b>\$ 56,763</b>	<b>\$ (35,566)</b>	<b>\$ 104,082</b>	
<b>Beginning Fund Balance</b>	<b>737,684</b>	<b>737,684</b>	<b>737,684</b>	<b>737,684</b>	
<b>Ending- Projected</b>	<b>\$ 794,447</b>	<b>\$ 794,447</b>	<b>\$ 702,118</b>	<b>\$ 841,766</b>	
FB as a % of Exp	31%	31%			

Fund	Beginning Fund Balance 7/1/2024 - Audited	Projected Revenues	Projected Expenditures	Projected Fund Balance 6/30/2025	Profit (Loss) CY
General Fund 1	699,039	2,356,762	2,311,038	744,763	45,724
Food Service Fund 2	3,333	153,232	152,898	3,667	334
Community Service Fund 4	35,312	132,825	122,120	46,017	10,705
	<b>737,684</b>	<b>2,642,819</b>	<b>2,586,056</b>	<b>794,447</b>	<b>56,763</b>



Swan River Montessori Charter School  
 Detail Revenue  
 As of January 31, 2025

58% Year Complete

	Adopted Budget - 163ADM/ 163PU	Working Forecast - 163ADM/ 163PU	Monthly Activity	Year to Date	% of Budget
<b>General Fund</b>					
<b>State Aid</b>					
General Aid	\$ 1,298,245	\$ 1,298,245	\$ 160,076	\$ 838,750	65%
Special Ed	690,063	690,063	-	176,539	26%
Lease Aid	214,182	214,182	-	74,504	35%
Literacy Incentive Aid	17,793	17,793	-	10,052	56.5%
Hourly Worker Unemployment	29,663	29,663	-	33,817	114.0%
School Library Aid	19,944	19,944	-	12,530	62.8%
Student Support Aid	19,304	19,304	-	6,000	31.1%
READ Act Literacy Aid	-	-	-	3,882	N/A
READ Act Training Aid	-	-	-	5,842	N/A
State Aid Receivables*	-	-	-	165,817	N/A
<b>Total State Aid</b>	<b>\$ 2,289,194</b>	<b>\$ 2,289,194</b>	<b>\$ 160,076</b>	<b>\$ 1,327,733</b>	<b>58%</b>
<b>Federal Aid</b>					
Title I	\$ 17,644	\$ 17,644	\$ -	\$ -	0%
Special Ed	31,024	31,024	-	-	0%
<b>Total Federal Aid</b>	<b>\$ 48,668</b>	<b>\$ 48,668</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0%</b>
<b>Local Aid and Donation</b>					
Interest	\$ 500	\$ 500	\$ 625	\$ 4,058	812%
Miscellaneous	8,000	8,000	-	8,556	106.9%
Donations and Other	10,000	10,000	-	40	0%
Fees for Services	400	400	-	4,275	1069%
<b>Total Local and Donation</b>	<b>\$ 18,900</b>	<b>\$ 18,900</b>	<b>\$ 625</b>	<b>\$ 16,929</b>	<b>90%</b>
<b>Total General Fund Revenue</b>	<b>\$ 2,356,762</b>	<b>\$ 2,356,762</b>	<b>\$ 160,701</b>	<b>\$ 1,344,661</b>	<b>57%</b>
<b>Food Service Fund</b>					
State Revenue	\$ 137,134	\$ 137,134	\$ -	\$ 5,959	4%
Federal Revenue	-	-	4	15,908	N/A
Food Sales	-	-	-	16	N/A
Transfer from General	16,098	16,098	-	-	0%
<b>Total Food Service Revenue</b>	<b>\$ 153,232</b>	<b>\$ 153,232</b>	<b>\$ 4</b>	<b>\$ 21,882</b>	<b>14%</b>
<b>Community Service Fund</b>					
Before/After School Care	\$ 48,000	\$ 48,000	\$ 5,750	\$ 24,600	51%
Children's House Tuition	84,825	84,825	5,018	36,710	43%
<b>Total Community Service Revenue</b>	<b>\$ 132,825</b>	<b>\$ 132,825</b>	<b>\$ 10,768</b>	<b>\$ 61,310</b>	<b>46%</b>
<b>Total Revenue- All Funds</b>	<b>\$ 2,642,819</b>	<b>\$ 2,642,819</b>	<b>\$ 171,472</b>	<b>\$ 1,427,853</b>	<b>54%</b>

Swan River Montessori Charter School  
Detail Expense  
As of January 31, 2025

FYTD: 58%

	Adopted Budget - 163ADM/ 163PU	Working Forecast - 163ADM/ 163PU	Monthly Activity	Year to Date	% of Budget
<b>Admin and Operations</b>					
100 Salaries	\$ 124,009	\$ 124,009	\$ 10,767	\$ 69,295	56%
200 Benefits	30,727	30,727	3,568	17,466	57%
305 Contracted Services	138,933	138,933	1,324	91,431	66%
320 Communication	6,026	6,026	482	2,911	48%
329 Postage	904	904	8	156	17%
330 Utilities	37,316	37,316	2,267	18,467	49%
340 Insurance	24,411	24,411	4,891	14,472	59%
350 Repairs & Maintenance	2,040	2,040	-	-	0%
366 Conferences/Professional Development	5,250	5,250	-	-	0%
401 General Supplies	24,102	24,102	1,633	12,520	52%
405 Purchased Software (405/406)	510	510	1,247	1,268	249%
490 Food	460	460	-	-	0%
570 Building Lease	253,380	253,380	16,532	129,884	51%
820 Dues & Memberships	20,948	20,948	9,040	12,780	61%
899 Misc Expenses - Missing Support	-	-	739	739	0%
910 Transfers to Other Funds	16,098	16,098	-	-	0%
<b>Total Admin and Operations</b>	<b>\$ 685,114</b>	<b>\$ 685,114</b>	<b>\$ 52,498</b>	<b>\$ 371,389</b>	<b>54%</b>
<b>Instructional Support and Services</b>					
100 Salaries	\$ 615,585	\$ 615,585	\$ 55,845	\$ 274,260	45%
200 Benefits	152,528	152,528	10,654	57,083	37%
1XX/2XX Summer Payable	-	-	-	61,502	NA
305 Contracted Services	-	-	-	15,965	0%
360 Transportation - Field Trips	12,555	12,555	1,200	5,453	43%
366 Conferences/Professional Development	6,300	6,300	-	1,707	27%
369 Field Trips and Registration	-	-	-	1,248	0%
401 General Supplies	13,948	13,948	668	9,441	68%
405 Purchased Software (405/406)	-	-	-	677	0%
430 Instructional Supplies	29,756	29,756	-	2,306	8%
455 Technology Supplies	-	-	-	180	0%
461 Standardized Tests	2,625	2,625	-	-	0%
490 Food	-	-	-	(9)	0%
820 Dues & Memberships	1,103	1,103	26	1,423	129%
<b>Total Instructional Support and Services</b>	<b>\$ 834,400</b>	<b>\$ 834,400</b>	<b>\$ 68,394</b>	<b>\$ 431,236</b>	<b>52%</b>

Swan River Montessori Charter School  
Detail Expense  
As of January 31, 2025

FYTD: 58%

	Adopted Budget - 163ADM/ 163PU	Working Forecast - 163ADM/ 163PU	Monthly Activity	Year to Date	% of Budget
<b>Special Education</b>					
100 Salaries	\$ 361,907	\$ 361,907	\$ 44,495	\$ 222,145	61%
200 Benefits	89,672	89,672	7,455	36,659	41%
1XX/2XX Summer Payable	-	-	-	39,360	NA
305 Contracted Services	7,166	7,166	-	(73)	-1%
366 Conferences/Professional Development	1,130	1,130	162	788	70%
394 Payments to Other Agencies	316,654	316,654	16,412	137,673	43%
401 General Supplies	4,599	4,599	211	1,733	38%
405 Purchased Software	1,725	1,725	500	2,375	138%
433 Instructional Supplies- Ind	8,671	8,671	-	-	0%
<b>Total Special Education</b>	<b>\$ 791,524</b>	<b>\$ 791,524</b>	<b>\$ 69,235</b>	<b>\$ 440,659</b>	<b>56%</b>
<b>Total General Fund Expenditures</b>	<b>\$ 2,311,038</b>	<b>\$ 2,311,038</b>	<b>\$ 190,126</b>	<b>\$ 1,243,284</b>	<b>54%</b>
<b>Food Service Fund</b>					
100 Salaries	\$ 6,569	\$ 6,569	\$ 1,232	\$ 6,483	99%
200 Benefits	2,987	2,987	410	2,123	71%
401 General Supplies	-	-	278	3,547	0%
490 Food	143,342	143,342	9,257	36,950	26%
820 Dues & Memberships	-	-	-	700	0%
<b>Total Food Service</b>	<b>\$ 152,898</b>	<b>\$ 152,898</b>	<b>\$ 11,176</b>	<b>\$ 49,803</b>	<b>33%</b>
<b>Community Ed Fund</b>					
100 Salaries	\$ 99,266	\$ 99,266	\$ 4,629	\$ 25,041	25%
200 Benefits	20,992	20,992	896	4,865	23%
394 Field Trips	232	232	-	-	0%
401 General Supplies	1,418	1,418	211	729	51%
430 Instructional Supplies	-	-	-	49	0%
820 Dues & Memberships	212	212	-	-	0%
<b>Total Community Ed</b>	<b>122,120</b>	<b>122,120</b>	<b>5,736</b>	<b>30,685</b>	<b>25%</b>
<b>Total Expense- All Funds</b>	<b>\$ 2,586,056</b>	<b>\$ 2,586,056</b>	<b>\$ 207,037</b>	<b>\$ 1,323,772</b>	<b>51%</b>

Swan River Montessori Charter School  
CashFlow  
As of January 31, 2025

5 Months Remaining

Cash Receipts	Budget	Monthly Activity	Year to Date	February
State Aids- Current Year	\$ 2,289,194	\$ 160,076	\$ 1,161,916	\$ 159,710
State Aids- Prior Year	5,449	-	-	1,821
Federal - Current Year	48,668	-	-	-
Local	151,725	11,393	78,239	14,697
Food Service	153,232	4	21,882	24,957
Total Inflows	\$ 2,648,268	\$ 171,472	\$ 1,262,036	\$ 201,185

Expense	Budget	Monthly Activity	Year to Date	February
Salary	\$ 1,207,336	\$ 116,967	\$ 597,224	\$ 100,611
Benefits	275,914	22,087	113,331	22,993
Purchased Services	579,909	27,642	295,062	56,969
Supplies and Materials	231,368	14,004	72,466	31,780
Capital Expenditures	253,380	16,532	129,884	24,699
Other Expenses	38,149	9,805	14,942	4,641
Accounts Payable	-	-	-	-
Total Outflows	\$ 2,586,056	\$ 207,037	\$ 1,222,910	\$ 241,694

Change in Cash \$ (40,510)

Beginning	\$ 770,065
Line of Credit	\$ -
Ending- Projected	\$ 729,555

Swan River Montessori Charter School  
CashFlow  
As of January 31, 2025

5 Months Remaining

Cash Receipts	Budget	Monthly Activity	Year to Date	March	April	May	June	Total	Budget	Remaining	
State Aids- Current Year	\$ 2,289,194	\$ 160,076	\$ 1,161,916	\$ 164,767	\$ 159,518	\$ 159,710	\$ 159,518	\$ 1,965,139	\$ 2,289,194	\$ 324,055	
State Aids- Prior Year	5,449	-	-	2,966	23,322	-	-	28,109	5,449	-	
Federal - Current Year	48,668	-	-	-	12,167	-	-	12,167	48,668	36,501	
Local	151,725	11,393	78,239	14,697	14,697	14,697	14,697	151,725	151,725	-	
Food Service	153,232	4	21,882	24,957	24,957	24,957	24,957	146,664	153,232	6,568	
Total Inflows	\$ 2,648,268	\$ 171,472	\$ 1,262,036	\$ 207,387	\$ 234,661	\$ 199,364	\$ 199,172	\$ 2,303,804	\$ 2,648,268	\$ 367,124	
<b>Expense</b>											
Salary	\$ 1,207,336	\$ 116,967	\$ 597,224	\$ 100,611	\$ 100,611	\$ 100,611	\$ 100,611	\$ 1,100,281	\$ 1,207,336	\$ 107,055	
Benefits	275,914	22,087	113,331	22,993	22,993	22,993	22,993	228,295	275,914	47,619	
Purchased Services	579,909	27,642	295,062	56,969	56,969	56,969	56,969	579,909	579,909	-	
Supplies and Materials	231,368	14,004	72,466	31,780	31,780	31,780	31,780	231,368	231,368	-	
Capital Expenditures	253,380	16,532	129,884	24,699	24,699	24,699	24,699	253,380	253,380	-	
Other Expenses	38,149	9,805	14,942	4,641	4,641	4,641	4,641	38,149	38,149	-	
Accounts Payable	-	-	-	-	-	-	-	-	-	-	
Total Outflows	\$ 2,586,056	\$ 207,037	\$ 1,222,910	\$ 241,694	\$ 241,694	\$ 241,694	\$ 241,694	\$ 2,431,382	\$ 2,586,056	\$ 154,674	
<b>Change in Cash</b>				\$ (34,308)	\$ (7,034)	\$ (42,331)	\$ (42,523)	\$ (127,578)			
<b>Beginning</b>				\$ 729,555	\$ 695,248	\$ 688,214	\$ 645,883	<b>Days Cash on Hand</b>			
<b>Line of Credit</b>				\$ -	\$ -	\$ -	\$ -	<b>91</b>			
<b>Ending- Projected</b>				\$ 695,248	\$ 688,214	\$ 645,883	\$ 603,361				

# NOTES TO THE FINANCIAL STATEMENTS

## JANUARY 2025

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- The financials statements are drafted on an accrual basis of accounting.
  - The financial statements are drafted based on information received from the school's leadership.
  - The numbers are subject to change based on timing of information received from the school.
  - The school's budget is based on full accrual projections as of the end of the fiscal year.
  - This report is unaudited and is prepared for internal use only.
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EdFinMN | 1400 Van Buren St. NE #200 | Minneapolis | MN | 55413  
| [www.edfinmn.org](http://www.edfinmn.org) | [info@edfinmn.org](mailto:info@edfinmn.org)

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	1053			City of Monticello		Wire	
		E 01 005 810 000 330		Water & Sewer Nov 24- 503 Maple St			\$54.61
PO#:	Voucher #:	13865	Invoice	DT010225	1/2/2025	Paid Amt:	\$54.61
		E 01 005 810 000 330		Water & Sewer Nov 24- 500 Maple St			\$201.07
PO#:	Voucher #:	13866	Invoice	DT010225	1/2/2025	Paid Amt:	\$201.07
						Check Amount:	\$255.68
SHBC	1639			TSYS		Wire	
		E 01 005 110 000 305		Payment Processing Fees -Jan			\$202.69
PO#:	Voucher #:	13867	Invoice	DT010325	1/2/2025	Paid Amt:	\$202.69
						Check Amount:	\$202.69
SHBC	1566			IRS		Wire	
		B 01 215 002		Federal Tax			\$10,585.51
PO#:	Voucher #:	13832	Invoice	S2025120	1/3/2025	Paid Amt:	\$10,585.51
						Check Amount:	\$10,585.51
SHBC	1001			PERA		Wire	
		B 01 215 007		PERA			\$3,279.91
PO#:	Voucher #:	13830	Invoice	S2025120	1/6/2025	Paid Amt:	\$3,279.91
						Check Amount:	\$3,279.91
SHBC	1002			TRA		Wire	
		B 01 215 006		TRA			\$5,349.03
PO#:	Voucher #:	13831	Invoice	S2025120	1/6/2025	Paid Amt:	\$5,349.03
						Check Amount:	\$5,349.03
SHBC	1567			MN Dept. Revenue		Wire	
		B 01 215 003		State Tax			\$1,639.07
PO#:	Voucher #:	13829	Invoice	S2025120	1/6/2025	Paid Amt:	\$1,639.07
						Check Amount:	\$1,639.07
SHBC	1052			Centerpoint Energy		Wire	
		E 01 005 810 000 330		Gas Charges-11/9/24-12/8/24 -503 Maple St			\$239.35
PO#:	Voucher #:	13869	Invoice	DT121124	1/8/2025	Paid Amt:	\$239.35
						Check Amount:	\$239.35
SHBC	1052			Centerpoint Energy		Wire	
		E 01 005 810 000 330		Gas Charges 11/09/24-12/08/24 -500 Maple St			\$695.53
PO#:	Voucher #:	13870	Invoice	DT121124	1/8/2025	Paid Amt:	\$695.53
						Check Amount:	\$695.53

Detail Payment Register By Check  
Check Number: 0-2147483647 Payment Date: 01/01/2025-1/31/2025 Period: 202507-202507 Void Status: N

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	1572			MN Unemployment Insurance		Wire	
		E 01 005 110 000 000 280		MN UI			\$1,552.00
PO#:	Voucher #:	13871	Invoice	Invoice No: DT010825	1/8/2025	Paid Amt:	\$1,552.00
						Check Amount:	\$1,552.00
SHBC	1616			MedSurety		Wire	
		B 01 215 016		Payroll Deductions-Vision			\$641.68
PO#:	Voucher #:	13828	Invoice	Invoice No: S2025120	1/8/2025	Paid Amt:	\$641.68
		E 01 005 110 000 000 305		HSA			\$30.00
PO#:	Voucher #:	13868	Invoice	Invoice No: DT010725	1/8/2025	Paid Amt:	\$30.00
						Check Amount:	\$671.68
SHBC	1050			SRCS Building Co		Wire	
		E 01 005 850 000 348 570		Lease-Jan 2025			\$16,531.67
PO#:	Voucher #:	13873	Invoice	Invoice No: DT011525	1/15/2025	Paid Amt:	\$16,531.67
						Check Amount:	\$16,531.67
SHBC	1054			Xcel Energy		Wire	
		E 01 005 810 000 330		Electric Charges 10/31/24-12/03/24			\$1,048.32
PO#:	Voucher #:	13872	Invoice	Invoice No: 906774369	1/15/2025	Paid Amt:	\$1,048.32
						Check Amount:	\$1,048.32
SHBC	1001			PERA		Wire	
		B 01 215 007		PERA			\$3,858.36
PO#:	Voucher #:	13840	Invoice	Invoice No: S2025130	1/23/2025	Paid Amt:	\$3,858.36
						Check Amount:	\$3,858.36
SHBC	1002			TRA		Wire	
		B 01 215 006		TRA			\$5,537.60
PO#:	Voucher #:	13841	Invoice	Invoice No: S2025130	1/23/2025	Paid Amt:	\$5,537.60
						Check Amount:	\$5,537.60
SHBC	1566			IRS		Wire	
		B 01 215 002		Federal Tax			\$11,855.49
PO#:	Voucher #:	13842	Invoice	Invoice No: S2025130	1/23/2025	Paid Amt:	\$11,855.49
						Check Amount:	\$11,855.49
SHBC	1567			MN Dept. Revenue		Wire	
		B 01 215 003		State Tax			\$1,891.68
PO#:	Voucher #:	13839	Invoice	Invoice No: S2025130	1/23/2025	Paid Amt:	\$1,891.68
						Check Amount:	\$1,891.68



Detail Payment Register By Check  
Check Number: 0-2147483647 Payment Date: 01/01/2025-1/31/2025 Period: 202507-202507 Void Status: N

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	Paid Amt:	Check Amount:
SHBC	1616			MedSurety		Wire		
		B 01	215	016	1/23/2025		\$731.68	\$731.68
PO#:	Voucher #:	13838	Invoice	Invoice No: S2025130				
SHBC	1184			US Bank - Credit Card		Wire		
		E 01	005	110 000 000 305			\$51.95	
		E 01	005	110 000 000 320			\$481.93	
		E 01	005	110 000 000 329			\$7.72	
		E 01	005	110 000 000 401			\$251.96	
		E 01	005	720 000 000 401			\$56.22	
		E 01	005	810 000 000 401			\$16.89	
		E 01	010	203 000 000 220			\$472.89	
		E 01	010	203 000 000 401			\$481.38	
		E 01	010	420 000 419 405			\$499.99	
		E 01	010	420 000 419 401			\$211.06	
		E 02	005	770 000 705 490			\$72.90	
		E 04	005	505 000 000 401			\$210.93	
		E 01	005	940 000 000 340			\$2,497.80	
PO#:	Voucher #:	13879	Invoice	Invoice No: DT011025	1/10/2025			\$5,313.62
								\$5,313.62
SHBC	1664			Elan Financial Services		Wire		
		E 01	010	203 000 000 820			\$12.87	
PO#:	Voucher #:	13880	Invoice	Invoice No: DT011725	1/21/2025			\$12.87
								\$12.87
SHBC	1530			Sherburne State Bank		Wire		
		E 01	005	110 000 000 305			\$35.00	
PO#:	Voucher #:	13881	Invoice	Invoice No: DT013125	1/31/2025			\$35.00
								\$35.00
SHBC	1664			Elan Financial Services		Wire		
		E 01	005	110 000 000 465			\$574.11	
		E 01	010	203 000 000 401			\$179.38	
		E 01	010	203 000 000 820			\$12.87	
PO#:	Voucher #:	13748	Invoice	Invoice No: DT112024	1/31/2025			\$766.36
		E 01	010	203 000 000 401			\$697.24	
		E 01	010	203 000 000 820			\$12.87	
		E 01	010	420 000 419 466			\$669.42	
PO#:	Voucher #:	13835	Invoice	Invoice No: DT112024	1/31/2025			\$1,379.53
								\$1,379.53

Detail Payment Register By Check  
Check Number: 0-2147483647 Payment Date: 01/01/2025-1/31/2025 Period: 202507-202507 Void Status: N

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	1664			Elan Financial Services		Wire	
		E 01 005 105 000 000 820		Amazon Prime			\$139.00
		E 01 010 203 000 000 820		Spotifyly			\$12.87
		E 01 005 105 000 000 899		Credit Refund			\$739.08
PO#:	Voucher #:	13915	Invoice	DT013125	1/31/2025	Paid Amt:	\$890.95
		E 01 005 110 000 000 305		Admin Service			\$370.08
		E 01 005 110 000 000 305		Communications			\$101.59
		E 01 005 110 000 000 305		Office Supplies			\$543.80
		E 01 005 810 000 000 305		Facility Service			\$76.95
		E 01 010 203 000 000 220		Benefits			\$1,761.83
		E 01 010 203 000 000 305		Classroom Services			\$84.00
		E 01 010 203 000 000 369		Field Trip			\$65.44
		E 01 010 203 000 000 401		Classroom Supplies			\$501.52
		E 01 010 203 000 000 490		Food			\$41.82
PO#:	Voucher #:	13745	Credit	DT112024	1/31/2025	Paid Amt:	(\$3,547.03)
		E 01 010 203 000 000 401		Classroom Supplies			\$511.26
		E 01 010 203 000 000 820		Music Subscription			\$11.80
PO#:	Voucher #:	13746	Invoice	DT112024	1/31/2025	Paid Amt:	\$523.06
						Check Amount:	\$12.87
SHBC	18434	1490		Heidi Melo		Check	
		E 01 010 203 000 000 401		Reimbursement -Supplies			\$105.48
PO#:	Voucher #:	13798	Invoice	DT120224	1/10/2025	Paid Amt:	\$105.48
						Check Amount:	\$105.48
SHBC	18435	1204		Adam's Pest Control, Inc.		Check	
		E 01 005 810 000 000 305		Prevention Plus			\$85.00
PO#:	Voucher #:	13843	Invoice	4037184	1/17/2025	Paid Amt:	\$85.00
						Check Amount:	\$85.00
SHBC	18436	1045		CMERDC		Check	
		E 01 005 110 000 000 465		Copier Base Rate/Usage			\$214.12
PO#:	Voucher #:	13844	Invoice	199420	1/17/2025	Paid Amt:	\$214.12
		E 01 005 110 000 000 465		Copier Base Rate/Usage Dec 24			\$214.12
PO#:	Voucher #:	13845	Invoice	56479	1/17/2025	Paid Amt:	\$214.12
						Check Amount:	\$428.24

Detail Payment Register By Check  
Check Number: 0-2147483647 Payment Date: 01/01/2025-1/31/2025 Period: 202507-202507 Void Status: N

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	Check Amount:
SHBC	18437	1612		Colonial Life		Check	
			B 01	215 015	Supplemental Benefits -Dec 2024		\$101.10
PO#:	Voucher #:	13846	Invoice	Invoice No: 5714381-1201799	1/17/2025	Paid Amt:	\$101.10
						Check Amount:	\$101.10
SHBC	18438	1689		Cullen Host		Check	
			E 01	005 810 000 305	Snow Removal -Feb		\$1,000.00
PO#:	Voucher #:	13847	Invoice	Invoice No: 02012025	1/17/2025	Paid Amt:	\$1,000.00
						Check Amount:	\$1,000.00
SHBC	18439	1636		EdFinMN		Check	
			E 01	005 110 000 000 305	Accounting/Consulting Fees - Jan		\$4,500.00
PO#:	Voucher #:	13848	Invoice	Invoice No: 2240	1/17/2025	Paid Amt:	\$4,500.00
						Check Amount:	\$4,500.00
SHBC	18440	1369		EMC Insurance Companies		Check	
			E 01	005 940 000 000 340	Property insurance		\$2,393.33
			E 01	005 110 000 000 305	Invoice Fee		\$5.00
PO#:	Voucher #:	13849	Invoice	Invoice No: 7002160772	1/17/2025	Paid Amt:	\$2,398.33
						Check Amount:	\$2,398.33
SHBC	18441	1324		Great Theatre		Check	
			E 01	005 110 000 000 305	Late Fee		\$20.00
PO#:	Voucher #:	13850	Invoice	Invoice No: 3041b	1/17/2025	Paid Amt:	\$20.00
						Check Amount:	\$20.00
SHBC	18442	1070		Hoglund Transportation, Inc.		Check	
			E 01	005 760 000 733 360	Transportation- St Cloud Field Trip		\$1,200.00
PO#:	Voucher #:	13851	Invoice	Invoice No: 216198	1/17/2025	Paid Amt:	\$1,200.00
						Check Amount:	\$1,200.00
SHBC	18443	1245		Innovative Office Solutions		Check	
			E 01	005 110 000 000 401	Copy Paper		\$363.84
PO#:	Voucher #:	13852	Invoice	Invoice No: IN4732840	1/17/2025	Paid Amt:	\$363.84
						Check Amount:	\$363.84
SHBC	18444	1690		Perfection Plus, Inc		Check	
			E 01	005 810 000 000 305	Janitorial Service Jan		\$4,200.00
PO#:	Voucher #:	13853	Invoice	Invoice No: 315758	1/17/2025	Paid Amt:	\$4,200.00
			E 01	005 810 000 000 305	Facility Supplies		\$516.05
			E 01	005 810 000 000 305	Facility Supplies		(\$516.05)

Detail Payment Register By Check  
Check Number: 0-2147483647 Payment Date: 01/01/2025-1/31/2025 Period: 202507-202507 Void Status: N

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	Check Amount:
SHBC	18444	1690		Perfection Plus, Inc		Check	
			E 01	005 810 000 000 401	Facility Supplies	\$516.05	
PO#:	Voucher #:	13854	Invoice	Invoice No: 315778	1/17/2025	Paid Amt:	\$516.05
						Check Amount:	\$4,716.05
SHBC	18445	1258		Premier Kitchen, Inc.		Check	
			E 02	005 770 000 705 490	Breakfast 12/01/24-12/15/24	\$2,627.50	
			E 02	005 770 000 701 490	Lunch 12/01/24-12/15/24	\$3,732.40	
			E 02	005 770 000 701 401	Food Supplies	\$277.50	
			E 02	005 770 000 701 490	Food Credit	(\$59.00)	
PO#:	Voucher #:	13855	Invoice	Invoice No: 38940	1/17/2025	Paid Amt:	\$6,578.40
			E 02	005 770 000 705 490	Breakfast 12/16/24-12/31/24	\$750.00	
			E 02	005 770 000 701 490	Lunch 12/16/24-12/31/24	\$2,132.80	
PO#:	Voucher #:	13856	Invoice	Invoice No: 39030	1/17/2025	Paid Amt:	\$2,882.80
						Check Amount:	\$9,461.20
SHBC	18446	1131		REGION V COMPUTER SERVICES		Check	
			E 01	005 110 000 000 405	FY25 Q3 Membership Fee	\$1,246.50	
PO#:	Voucher #:	13857	Invoice	Invoice No: 17599	1/17/2025	Paid Amt:	\$1,246.50
						Check Amount:	\$1,246.50
SHBC	18447	1367		Sharon Schneider		Check	
			E 01	010 203 000 000 401	Reimbursement- Classroom Supplies	\$186.97	
PO#:	Voucher #:	13858	Invoice	Invoice No: DT010224	1/17/2025	Paid Amt:	\$186.97
						Check Amount:	\$186.97
SHBC	18448	1087		Sora Pediatric Therapy		Check	
			E 01	010 420 000 419 366	Mileage Reimbursement- 44 Miles	\$29.90	
PO#:	Voucher #:	13860	Invoice	Invoice No: 122024122646	1/17/2025	Paid Amt:	\$29.90
			E 01	010 410 000 740 394	OT Specialist L Snell12/02/24-12/19/24 96.5h @	\$8,492.00	
PO#:	Voucher #:	13859	Invoice	Invoice No: 122024121362	1/17/2025	Paid Amt:	\$8,492.00
			E 01	010 401 000 740 394	Spec A Turner 12/02/24-12/19/24 90h @ \$88	\$7,920.00	
PO#:	Voucher #:	13861	Invoice	Invoice No: 122024121364	1/17/2025	Paid Amt:	\$7,920.00
						Check Amount:	\$16,441.90
SHBC	18449	1606		The Master Teacher		Check	
			E 01	010 400 640 372 366	Para educator Online Training	\$132.00	
			E 01	010 400 640 372 366	Para educator Online Training	(\$132.00)	
			E 01	010 420 640 419 366	Para educator Online Training	\$132.00	
PO#:	Voucher #:	13862	Invoice	Invoice No: 116805479	1/17/2025	Paid Amt:	\$132.00
						Check Amount:	\$132.00

Check Number: 0-2147483647 Payment Date: 01/01/2025-1/31/2025 Period: 202507-202507 Void Status: N  
Detail Payment Register By Check

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	18450	1466		The McDowell Agency, INC		Check	
		E 01	005	105 000 000 305		\$95.70	
				Background Checks			
PO#:	Voucher #:	13863	Invoice	Invoice No: 158962	1/17/2025	Paid Amt: \$95.70	Check Amount: \$95.70
SHBC	18451	1067		WH Security, LLC		Check	
		E 01	005	810 000 330		\$27.95	
				Alarm monitoring			
PO#:	Voucher #:	13864	Invoice	Invoice No: DT123024	1/17/2025	Paid Amt: \$27.95	Check Amount: \$27.95
						Report Total:	\$113,809.87

**SWAN RIVER MONTESSORI CHARTER SCHOOL**  
**School Board Meeting**  
**Tuesday, January 21, 2025 at 2:30 p.m.**

The school board will hold this meeting in person at Swan River Montessori Charter School at 503 Maple St. building.

**Meeting Agenda**

**I. CALL TO ORDER at 503 Kitchen at Swan River Montessori Charter School by Jana Evink @ 2:20 pm**

**II. ROLL CALL**

- a. Board Members Present: Jana Evink, Nicole Perez, Rick Freese, Amy Savage, Amy Jensen
- b. Board Members Absent: Julie Halvorson, Claire Belknap
- c. Other Attendees: School Director Annette Vemuri, Bridget Peterson & Nick from EdFin, Joe Kounkel from Hogle Transportation
- d. Recording Minutes : Amy Jensen

**III. REVIEW OF SRMCS MISSION AND VISION STATEMENTS**

The mission of Swan River Montessori Charter School is to provide a child-centered environment for self-directed and personalized learning in a small, community-based public school with an emphasis on the natural environment.

Swan River Montessori Charter School’s vision is to employ an interdisciplinary approach to education by teaching the whole child (heart, mind, and soul). The Montessori learning environment is designed to foster this whole child approach by meeting the child’s inherent needs of self-discovery, creativity, independence, and competence. Swan River Montessori Charter School will create a kind, respectful environment where each child has a sense of belonging. Learning at Swan River Montessori Charter School involves the student, the student’s family, the teachers, and the larger community. Swan River supports family and community participation in each child’s education by utilizing and appreciating community resources and the natural world as a learning environment.

**IV. MEETING AGENDA-** Motion to approve meeting agenda with items a-d and Attendance, Personal Devices, & Harassment policies added to new business made by Jensen, Seconded by Freese. Board Vote- All “aye”, Motion carries

**V. DECLARATION OF CONFLICTS-** none

**VI. FINANCIAL REPORT**

- a. December Financial Report –Bridgit shared an overview of December financials and praised the school for having 93 days worth of cash on hand. Bridgit clarified a question from the previous month showing that a line item coded miscellaneous was from PTO and Read-a-thon. Board had no other questions. Motion to approve December financials made by Jensen, Seconded by Savage. Board Vote- All “aye” Motion carries.
  
- a. FY25 Enrollment Numbers as of 1.17.25
  - i. Charter School (K-6) = 167
  - ii. Children’s House (EC) = 13
  - iii. Pupil Unit Actual/Budget = 167/163
  
- b. Review of Bills- reviewed

c. Donations- none

**VII. CONSENT AGENDA** - Motion to approve consent agenda by Savage , Seconded by **Perez** . Board Vote- all aye, motion carries

- a. December Minutes
- b. Attendance Policy- moved to new business**
- c. Equal Employment Policy
- d. Disability Non-Discrimination Policy
- e. Harassment and Violence Policy- moved to new business**
- f. Review Reducing Lead in Drinking Water Technical Guide
- g. Student Disability Non-Discrimination Policy
- h. Student Journalism Policy
- i. Non-Discrimination Policy
- j. SRMCS Personal Electronic Device Policy- moved to new business**

**VIII. ENVIRONMENTAL EDUCATION REPORT AS RELATED TO CONTRACTED GOAL**

**IX. ACADEMIC PERFORMANCE REPORT AS RELATED TO CONTRACTED GOALS –**

**X. DIRECTOR GOALS-**

**XI. STRATEGIC PLANNING & GOAL SETTING-**

**XII. OLD BUSINESS-**

**XIII. NEW BUSINESS**

- a. Hoglund Transportation- Joe Kounkel shared details of what bussing would look like if SRMCS switched afternoon bussing to align with the Middle & High School dismissal for the 25-26 school year. This should shorten the wait time on the bus for our families. Proposed- SRMCS dismissal at 2:40 PM- one bus from SRMCS to Middle School where students disperse to neighborhood buses. Then those buses go to the high school before heading out to routes. Annette and the board want to gather more information on how this would impact families and staff before deciding whether or not to change dismissal time for FY26. Tabled to February meeting.
- b. Board Elections- Board discussed making elections more secure using an online voting system called Election Buddy and moving the election window to late March- early April. Motion to approve to use Election Buddy and moving up election window made by Freese, Seconded by Savage. Board Vote- all aye, motion carries
- c. Board Training- Board clarified procedure for board member training. Before seated: Open Meeting Law, Board Roles and Responsibilities, Data Practices; within 1st year: Finance, Employment Policies and Practices, Public School Funding and Management, Student Success Achievement and Performance; 2nd yr: repeat trainings from before seated group; 3rd year: choose from Charter School Contract, Compliance and Technical Assistance, Audit, School Budget;, Re-elected: one per year (board member choice). Complete course and send info to director and board chair.

- d. Policy Services by MN School Boards Association- board discussed becoming a member of MSBA and utilizing their policy services. Initial cost for membership approx \$2000 and policy services approx \$2000. MSBA can also audit policies for an additional \$1200. Vemuri wants to gather more information on whether cost can be prorated and has a few questions answered. Board will table and revisit at the February meeting.
- e. Attendance Policy- Motion to approve policy made with revisions by Perez , Seconded by Freese. Board Vote- all aye, motion carries
- f. Harassment and Violence Policy- table to February meeting
- g. SRMCS Personal Electronic Device Policy- Motion to approve with revisions made by Perez, Seconded by Freese. Board Vote- all aye, motion carries

#### **XIV. REVIEW OF NEXT MEETING AGENDA**

- a. Date, Time & Location of next Board Meeting – **February 18, 2025 in the 503 building @ 2:30 pm**
- b. Upcoming Agenda Items

##### New Business

- Approve School Calendar for Next Year
- Confirm Auditor Contract
- Review Assumptions and Preliminary Numbers for Upcoming Budget Year
- Fixed Assets Policy
- Nepotism Policy
- Public and Private Personnel Data

##### Tabled Items

- Policy Services by MN School Boards Association
- Harassment and Violence Policy
- Proposed FY26 transportation/dismissal time change

- XV. MOTION TO ADJOURN by Savage at 4:00 PM, Seconded by Jensen. Board Vote- all in favor ‘ aye’, motion carries**



Swan River Montessori Charter School

Approved: 8/29/2005

Reviewed: 5/21/2024

**Fixed Assets Policy**

This policy establishes the minimum cost value (capitalization amount) that shall be used to determine the capital assets, including infrastructure assets that are to be recorded in Swan River Montessori Charter School’s annual financial statements in order to comply with the requirements of GASB Statement No. 34.

This policy also addresses other considerations for recording and depreciating fixed assets for the compliance with the provisions of GASB Statement No. 34.

Capital Assess Definition

Capital assets will be defined as tangible and intangible assets that have initial estimated useful lives that extend beyond a single reporting period.

Capitalization Method

All capital assets will be recorded at historical cost as of the date acquired or constructed, or fair market value at date of gift, if donated. If historical cost information is not available, assets will be recorded at estimated historical cost by calculating current replacement cost and deflating the cost using the appropriate price-level index.

Capitalization Thresholds

The district establishes the following minimum capitalization thresholds for capitalizing fixed assets:

Land and Improvements:	\$5,000.00
Buildings and Improvements:	\$5,000.00
Machinery/Equipment/Vehicles:	\$5,000.00

Detailed records shall be maintained for all fixed assets above the established thresholds.

Other Assets

Detailed records shall be maintained at the discretion of school administration for all items below the capitalization thresholds that should be safeguarded from loss. These items will be part of

the annual physical inventory discussed below. These items include furniture and computer equipment that fall below the established thresholds and any other assets specified by school administration.

#### Depreciation and Useful Life

School administration will assign an estimated useful life to all fixed assets for the purposes of recording depreciation. Asset lives will be adjusted as necessary depending on the present condition and use of the asset and based on how long the asset is expected to meet current service demands. Adjustments should be properly documented. Depreciation will be recorded based on the straight-line method using actual month convention and depreciated down to the assets salvage value.

#### Safeguarding and Controlling Fixed Assets

All machinery, equipment, and furniture will be assigned to an asset number. As fixed assets are purchased or disposed of, school administration or the responsible program authority will be responsible for preparing proper supporting documentation, which will then be forwarded to SRMCS Charter School's business office to ensure proper recording into a software system. A physical inventory will be taken annually on or about June 30 and compared to the physical inventory records.

## Swan River Montessori Charter School

Adopted: 11.20.13

Revised: 2.26.19

### **NEPOTISM POLICY**

#### **PURPOSE**

To clearly define Swan River Montessori Charter School's policy regarding the standards for close relatives working for the Charter School in the same or different departments.

#### **POLICY**

The Board of Directors permits the employment of qualified relatives of employees of the employee's household or immediate family as long as such employment does not, in the opinion of the Charter School, create actual conflicts of interest. For purposes of this policy, "immediate family" is defined as a spouse, child, parent, sibling, grandparent, grandchild, aunt, uncle, first cousin, corresponding in-law, "step" relation or any member of the employee's household. The School Director will use sound judgment in the placement of related employees in accordance with the following guidelines:

- Individuals who are related by blood, marriage, or reside in the same household are permitted to work in the same Charter School department, provided no direct reporting or supervisor to subordinate relationship exists. That is, no employee is permitted to work within "the chain of command" when one relative's work responsibilities, salary, hours, career progress, benefits or other terms and conditions of employment could be influenced by the other relative.
- Related employees may have no influence over the wages, hours, benefits, career progress and other terms and conditions of the other related staff members.
- Employees who marry while employed, or become part of the same household are treated in accordance with these guidelines. That is, if in the opinion of the charter school, a conflict arises as a result of the relationship, one of the employees may be transferred at the earliest practicable time.

Any exceptions to this policy must be approved by the Board of Directors and/or the School Director at the time of hiring and prior to contract renewal.

Swan River Montessori Charter School

Adopted: August 2005

Reviewed: 2.26.19

**PUBLIC AND PRIVATE PERSONNEL DATA POLICY**

**PURPOSE**

The purpose of this policy is to provide guidance to school district employees as to the data the school district collects and maintains regarding its personnel.

**GENERAL STATEMENT OF POLICY**

All data on individuals collected, created, received, maintained or disseminated by the school district, which is classified by statute or federal law as public, shall be accessible to the public pursuant to the procedures established by the school district.

All other data on individuals is private or confidential.

**DEFINITIONS**

- A. "Public" means that the data is available to anyone who requests it.
- B. "Private" means the data is available to the subject of the data and to school district staff who need it to conduct the business of the school district.
- C. "Confidential" means the data is not available to the subject.
- D. "Personnel data" means data on individuals collected because they are or were employees of the school district, applicants for employment, volunteers for the school district, or members of or applicants for an advisory board or commission. Personnel data include data submitted to the school district by an employee as part of an organized self-evaluation effort by the school district to request suggestions from all employees on ways to cut costs, make the school district more efficient, or to improve school district operations. An employee who is identified in a suggestion shall have access to all data in the suggestion except the identity of the employee making the suggestion.
- E. "Finalist" means an individual who is selected to be interviewed by the school board for a position.
- F. "Protected health information" means individually identifiable health information transmitted in electronic form by a school district acting as a health care provider. Protected health information excludes health information in education records covered by FERPA and employment records held by a school district in its role as employer.

**PUBLIC PERSONNEL DATA**

A. The following information on employees, including volunteers and independent contractors, is public:

1. name;
2. employee identification number, which may not be the employee's social security number;
3. actual gross salary;
4. salary range;
5. contract fees;
6. actual gross pension;
7. the value and nature of employer-paid fringe benefits;
8. the basis for and the amount of any added remuneration, including expense reimbursement, in addition to salary;
9. job title;
10. bargaining unit;
11. job description;
12. education and training background;
13. previous work experience;
14. date of first and last employment;
15. the existence and status of any complaints or charges against the employee, regardless of whether the complaint or charge resulted in a disciplinary action;
16. the final disposition of any disciplinary action, as defined in Minn. Stat. § 13.43, Subd. 2(b), together with the specific reasons for the action and data documenting the basis of the action, excluding data that would identify confidential sources who are employees of the school district;
17. the terms of any agreement settling any dispute arising out of the employment relationship, including superintendent buyout agreements, except that the agreement must include specific reasons for the agreement if it involves the payment of more than \$10,000 of public money, and such agreement may not have the purpose or effect of limiting access to or disclosure of personnel data or limiting the discussion of information or opinions related to personnel data;
18. work location;

19. work telephone number;
  20. honors and awards received; and
  21. payroll time sheets or other comparable data that are used only to account for employee's work time for payroll purposes, except to the extent that release of time sheet data would reveal the employee's reasons for the use of sick or other medical leave or other not public data.
- B. The following information on applicants for employment or to an advisory board/ commission is public:
1. veteran status;
  2. relevant test scores;
  3. rank on eligible list;
  4. job history
  5. education and training; and
  6. work availability.
- C. Names of applicants are private data except when certified as eligible for appointment to a vacancy or when they become finalists for an employment position.
- D. Names and home addresses of applicants for appointment to and members of an advisory board/commission are public.
- E. Regardless of whether there has been a final disposition as defined in Minn. Stat. § 13.43, Subd. 2(b), upon completion of an investigation of a complaint or charge against a public official, as defined in Minn. Stat. § 13.43, Subd. 2(e), or if a public official resigns or is terminated from employment while the complaint or charge is pending, all data relating to the complaint or charge are public, unless access to the data would jeopardize an active investigation or reveal confidential sources.

#### **PRIVATE PERSONNEL DATA**

- A. All other personnel data are private and will only be shared with school district staff whose work requires such access. Private data will not be otherwise released unless authorized by law or by the employee's informed written consent.
- B. Data pertaining to an employee's dependents are private data on individuals.
- C. Data created, collected or maintained by the school district to administer employee assistance programs are private.
- D. Personnel data may be disseminated to labor organizations to the extent the school district determines it is necessary for the labor organization to conduct its business or when ordered or authorized by the Commissioner of the Bureau of Mediation Services.
- E. The school district may display a photograph of a current or former employee to prospective

witnesses as part of the school district's investigation of any complaint or charge against the employee.

F. The school district may, if the responsible authority or designee reasonably determines that the release of personnel data is necessary to protect an employee from harm to self or to protect another person who may be harmed by the employee, release data that are relevant to the concerns for safety to:

1. The person who may be harmed and to the attorney representing the person when the data are relevant to obtaining a restraining order;
2. A pre-petition screening team conducting an investigation of the employee under Minn. Stat. § 253B.07, Subd. 1; or
3. A court, law enforcement agency or prosecuting authority.

H. Private personnel data or confidential investigative data on employees may be disseminated to a law enforcement agency for the purpose of reporting a crime or alleged crime committed by an employee, or for the purpose of assisting law enforcement in the investigation of such a crime or alleged crime.

I. A complainant has access to a statement provided by the complainant to the school district in connection with a complaint or charge against an employee.

J. When allegations of sexual or other types of harassment are made against an employee, the employee shall not have access to data that would identify the complainant or other witnesses if the school district determines that the employee's access to that data would:

1. threaten the personal safety of the complainant or a witness; or
2. subject the complainant or witness to harassment.

If a disciplinary proceeding is initiated against the employee, data on the complainant or witness shall be available to the employee as may be necessary for the employee to prepare for the proceeding.

K. The school district shall make any report to the board of teaching or the state board of education as required by Minn. Stat. § 122A.20, Subd. 2, and shall, upon written request from the licensing board having jurisdiction over a teacher's license, provide the licensing board with information about the teacher from the school district's files, any termination or disciplinary proceeding, and settlement or compromise, or any investigative file in accordance with Minn. Stat. § 122A.20, Subd. 2.

L. Private personnel data shall be disclosed to the department of economic security for the purpose of administration of the unemployment insurance program under Minn. Stat. Ch. 268.

M. When a report of alleged maltreatment of a student in a school is made to the Commissioner of Education, data that are relevant and collected by the school about the

person alleged to have committed maltreatment must be provided to the Commissioner on request for purposes of an assessment or investigation of the maltreatment report.

- N. The school district shall release to a requesting school district or charter school private personnel data on a current or former employee related to acts of violence toward or sexual contact with a student, if an investigation conducted by or on behalf of the school district or law enforcement affirmed the allegations in writing prior to release and the investigation resulted in the resignation of the subject of the data.
- O. The identity of an employee making a suggestion as part of an organized self-evaluation effort by the school district to cut costs, make the school district more efficient, or to improve school district operations is private.
- P. Health information on employees is private unless otherwise provided by law. To the extent that the school district transmits protected health information, the school district will comply with all privacy requirements.

#### **MULTIPLE CLASSIFICATIONS**

If data on individuals are classified as both private and confidential by Minn. Stat. Ch. 13, or any other state or federal law, the data are private.

#### **CHANGE IN CLASSIFICATIONS**

The school district shall change the classification of data in its possession if it is required to do so to comply with other judicial or administrative rules pertaining to the conduct of legal actions or with a specific statute applicable to the data in the possession of the disseminating or receiving agency.

#### **RESPONSIBLE AUTHORITY**

The school district has designated the School Director or designee as the authority responsible for personnel data. If you have any questions, contact the School Director or designee.

#### **EMPLOYEE AUTHORIZATION/RELEASE FORM**

An employee authorization form is included as an addendum to this policy.



Adopted: August 29, 2005

Reviewed: 1.24.23

## **Harassment and Violence Prohibition Policy (Bullying Prohibition Policy)**

### **I. PURPOSE**

- A. It will be a violation of this policy for any student or district employee to harass a student or district employee through conduct (e.g., physical, verbal, graphic or written) that is based upon that student or employee's actual or perceived race, color, creed, national origin, religion, sex/gender, sexual orientation, disability, public assistance, or marital status or age [protected class] as defined by this policy. For purposes of this policy, a district employee includes school board members, school employees, agents, volunteers, contractors, or persons subject to the supervision and control of the district. For purposes of this policy, school district includes charter schools.
- B. It will be a violation of this policy for any student or district employee to inflict, threaten to inflict, or attempt to inflict violence based upon a student or district employee's actual or perceived protected class as defined by this policy.
- C. The school district will investigate all complaints, formal or informal, verbal or written, of harassment and/or violence based upon a student or employee's perceived or actual protected class and to discipline or take appropriate action against any student or school district employee who is found to have violated this policy.

### **II. DEFINITIONS**

The following definitions, which have been modified for purposes of this policy, are found in the Minnesota Human Rights Act. Please note that there is not a definition for every protected class.

- A. Disability. "'Disability" means any condition or characteristic that renders a person a disabled person. A disabled person is any person who (1) has a physical, sensory, or mental impairment which materially limits one or more major life activities; (2) has a record of such an impairment; or (3) is regarded as having such an impairment."<sup>1</sup>
- B. Discriminate. "The term "discriminate" includes segregate or separate and, for purposes of discrimination based on sex, it includes sexual harassment."
- C. Educational institution. "Educational institution" means a public or private institution and includes an academy, college, elementary or secondary school, extension course,

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<sup>1</sup> This includes students with an IFSP, IEP, and students who qualify for special education and related aids and services under Section 504 of the Rehabilitation Act.

kindergarten, nursery, school system and a business, nursing, professional, secretarial, technical, vocational school, and includes an agent of an educational institution.”

- D. National origin. ““National origin” means the place of birth of an individual or of any of the individual's lineal ancestors.”<sup>2</sup>
- E. Sexual harassment. “Sexual harassment” includes unwelcome sexual advances, requests for sexual favors, sexually motivated physical contact or other verbal or physical conduct or communication of a sexual nature when:
  - (1) submission to that conduct or communication is made a term or condition, either explicitly or implicitly, of obtaining employment, ... [or] education...;
  - (2) submission to or rejection of that conduct or communication by an individual is used as a factor in decisions affecting that individual's employment, ...[or] education...; or
  - (3) that conduct or communication has the purpose or effect of substantially interfering with an individual's employment, ...[or] education..., or creating an intimidating, hostile, or offensive employment, ...[or] educational... environment.”
- F. Sexual orientation. "Sexual orientation" means having or being perceived as having an emotional, physical, or sexual attachment to another person without regard to the sex of that person or having or being perceived as having an orientation for such attachment, or having or being perceived as having a self-image or identity not traditionally associated with one's biological maleness or femaleness.

### III. HARASSMENT AND VIOLENCE GENERAL APPLICABILITY

- A. The anti discrimination laws apply to all of the academic and nonacademic (e.g. athletic, and extracurricular) programs of the school district, whether conducted in school district facilities or elsewhere.
- B. For purposes of this policy, any student who is harassed or discriminated against, including subject to violence, by peers or school district employees based upon that student’s actual or perceived sex/gender, sexual orientation, race, color, creed, national origin, religion, disability, receipt of public assistance, or marital status and age [protected class] may file a complaint as described more fully in section IV below.
- C. For purposes of this policy, any school district employee who is harassed or discriminated against, including violence, by students or other school district employees based upon that employee’s actual or perceived sex/gender, sexual orientation, race, color, creed, national origin, religion, disability, receipt of public assistance, or marital status and age may file a complaint as described more fully in section IV below.
- D. The alleged harassment/violence consists of harassing conduct (e.g. physical, verbal, graphic, or written verbal or physical) based upon that student’s actual or perceived protected class that interferes or limits the ability of that student to participate in, enjoy, or benefit from the education program, including athletics and extracurricular activities.
- E. The alleged harassment/violence may not be directed at a particular person, but may instead consist of harassing conduct (e.g. physical, verbal, graphic, or written) that

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<sup>2</sup> This includes harassment of students born in the United States who have relatives that are from other countries.

creates a hostile environment for students based upon actual or perceived protected class that interferes with or limits the student's ability to participate in, enjoy, or benefit from the academic and nonacademic programs, including athletics and extracurricular activities.

IV. DESCRIPTION OF HARASSMENT BASED UPON A PERSON'S PERCEIVED OR ACTUAL PROTECTED CLASS

A. Harassment is unwelcome conduct that is based upon actual or perceived sex/gender, sexual orientation, race, color, creed, national origin, religion, disability, receipt of public assistance, or marital status and age.

(1) Harassing conduct may take many forms, including verbal acts and name-calling, as well as nonverbal behavior, such as graphic and written statements, or conduct that is physically threatening, harmful, or humiliating.

(2) It is unwelcome if the student or employee did not request or invite it and considered the conduct to be undesirable or offensive.

(3) The conduct is considered harassment if it creates a hostile environment by interfering with or denying a student's participation in or receipt of benefits, services, or opportunities in the school district's programs.

B. Sexual harassment based upon sex/gender and/or sexual orientation

(1) Sexual conduct that is unwelcome.

a. It is unwelcome if the student or employee did not request or invite it and considered the conduct undesirable or offensive.

b. A student's submission or failure to complain does not mean that the conduct was welcome – look at circumstances.

C. Sexual violence: Sexual violence is a physical act of aggression or force or the threat thereof which involves the touching of another's intimate parts, or forcing a person to touch any person's intimate parts. Intimate parts, as defined in Minnesota Statutes, section 609.341, includes the primary genital area, groin, inner thigh, buttocks or breast, as well as the clothing covering these areas.

(1) Sexual violence includes rape, sexual assault, and dating violence. This includes coerced sexual intercourse or other sexual acts. The physical act is considered non consensual if a person is incapable of giving consent due to alcohol or drug use or due to an intellectual or other disability.

(2) Sexual violence includes touching, patting, grabbing, or pinching another student's or employee's intimate parts of the clothing covering the intimate parts.

(3) Sexual violence includes coercing or forcing or attempting to coerce or force a student or employee to touch anyone's intimate parts.

(4) A police report does not relieve the school of its responsibilities under Title IX.

D. Assault: Assault, as defined in state statute is:

- (1) an act done with intent to cause fear in another of immediate bodily harm or death; or
- (2) the intentional infliction of or attempt to inflict bodily harm upon another.

E. Racial, color, creed or national origin harassment/violence

- (1) Intimidation or abusive behavior toward a student, based on perceived or actual race, color, creed or national origin, that creates a hostile environment by interfering with or denying a student's participation in or receipt of benefits, services, or opportunities in the school district's programs.
- (2) Racial violence: Racial violence is a physical act of aggression or force, or the threat thereof, which is directed toward a student or employee based upon their perceived or actual race, color, creed, or national origin.

F. Religious harassment/violence

- (1) Intimidation or abusive behavior toward a student based on perceived or actual religious beliefs that create a hostile environment by interfering with or denying a student's participation in or receipt of benefits, services, or opportunities in the school district's programs.
- (2) Religious violence is the threat of or an actual physical act of aggression or force which is directed toward a student or employee based upon their perceived or actual religion.

G. Disability harassment

- (1) Intimidation or abusive behavior toward a student based on disability that creates a hostile environment by interfering with or denying a student's participation in or receipt of benefits, services, or opportunities in the school district's programs.
- (2) Disability harassment also may deny a student with a disability a free and appropriate public education (FAPE). Harassment of a student based on disability may decrease the student's ability to benefit from his or her education and amount to a denial of FAPE.

V. REPORTING PROCEDURES

- A. The adoption and implementation of a proper reporting system can help the school district comply with the Minnesota Human Rights Act by allowing the school district to promptly address allegations of harassment and violence.
- B. Pursuant to Title IX, each school district must designate at least one employee to coordinate its efforts to comply with and carry out its responsibilities under the regulations, including Title IX complaint investigation (Title IX Coordinator). 34 C.F.R., section 106.8(a). Each school district must also publish grievance procedures providing for prompt and equitable resolution of sex discrimination complaints, including complaints of sexual harassment. In addition, under Section 504 and Title II, school districts are also required to have grievance procedures to address disability harassment.

- C. Minnesota Statutes, section 121A.03 requires that school districts have reporting procedures for sexual, religious, and racial harassment and/or violence complaints.
- (1) For purposes of meeting the state reporting requirements, the following reporting procedure will be made available for students and staff who wish to report an incident or incidents that may involve harassment or violence based upon actual or perceived sex/gender, sexual orientation, race, color, creed, national origin, religion, disability, receipt of public assistance, or marital status and age.
  - (2) Designated school district person to receive oral or written complaints/reports of actual or perceived sex/gender, sexual orientation, race, color, creed, national origin, religion, disability, receipt of public assistance, or marital status and age.
- D. Human Rights Officer Designation
- (1) The school board hereby designates the School Director and/or the Operations Coordinator as the school district human rights officer(s) to receive reports or complaints of harassment or violence based upon actual or perceived sex/gender, sexual orientation, race, color, creed, national origin, religion, disability, receipt of public assistance, or marital status and age. If the complaint involves one of the designated human rights officers, the complaint will be filed directly with the superintendent.
  - (2) In the event the superintendent is the designated human rights officer, the complaint should be filed directly with the school board.
- E. The school district will conspicuously post the name of the human rights officer(s), superintendent, and school board: including mailing addresses and telephone numbers.
- (1) The Human Rights Officer is Annette Vemuri  
Mailing address: 500 Maple Street Monticello MN 55362  
Telephone number: 763-271-7926  
Email address: [director@swanrivermontessori.org](mailto:director@swanrivermontessori.org)
  - (2) The superintendent is Annette Vemuri  
Mailing address: 500 Maple Street Monticello MN 55362  
Telephone number: 763-271-7926  
Email address: [director@swanrivermontessori.org](mailto:director@swanrivermontessori.org)
  - (3) The school board contact information is: Franco Fanucci, Board President  
Mailing address: 500 Maple Street Monticello MN 55362  
Telephone number: 763-271-7926  
Email address: [francof@swanrivermontessori.org](mailto:francof@swanrivermontessori.org)

- F. These reporting procedures are not intended to prevent a person from reporting harassment or violence incident(s) to another school official.
  - (1) The school official must immediately notify the principal, who is then responsible to submit the oral or written complaint/report to the human rights officer without screening or investigating the credibility of the report. If the school principal is not available on the date of the report, then the school official must forward the oral or written report/complaint directly to the human rights officer.
  - (2) If the report was given verbally, the principal will personally reduce it to written form within 24 hours and forward it to the human rights officer.
    - a. If the school principal fails to forward any harassment or violence report or complaint (written or verbal) to the human rights officer within 24 hours, the principal will be subject to disciplinary action.
  - (3) If the complaint involves the building principal, the complaint will be made or filed directly with the superintendent or the school district human rights officer by the school official or reporting party or complainant.
- G. The human rights officer may request, but not insist, upon a written complaint. The school district encourages the reporting party to complete the complaint form for written complaints. It is available from the principal of each building or the school district office. Alternative means of filing a complaint, such as through a personal interview or by tape recording, will be made available upon request for qualified persons with a disability.
- H. The complaint (verbal or written) should be reported to a school official immediately, or within 30 calendar days whenever possible, of the alleged violation. The school district will accept reports of alleged incidents that are older than 30 calendar days; however, delays between the date of the alleged incident and the reporting date may make investigations more difficult.

## VI. INVESTIGATION

- A. The human rights officer, upon receipt of a complaint alleging discrimination or harassment toward an employee or student, will promptly undertake an investigation if deemed appropriate. The Title IX coordinator may conduct the investigation complaints of sexual harassment, the 504 coordinator for complaints of disability harassment, or the human rights officer for other types of alleged harassment and violence covered by this policy. The Title IX coordinator/504 coordinator or human rights officer may designate a neutral third party to conduct the investigation. The investigation will be completed within 30 calendar days from receipt of the complaint, unless impracticable.
- B. The investigation may consist of personal interviews with the complainant, the individual(s) against whom the complaint is filed, and others who may have knowledge of the alleged incident(s) or circumstances giving rise to the complaint. The investigation may also consist of any other methods and documents deemed pertinent by the investigator.
- C. In determining whether alleged conduct constitutes a violation of this policy, the school district will consider the facts and the surrounding circumstances, such as the nature of the behavior, past incidents or continuing patterns of behavior, the relationships between the parties involved, and the context in which the alleged incident occurred.

- D. The school district may take immediate steps to protect the parties involved in the complaint process, pending completion of an investigation of alleged unlawful discrimination or harassment of an employee or student.
- (1) Upon completion of the investigation, the school district or neutral third party designated investigator will make a written report to the human rights officer. If the complaint involves the human rights officer, the report must be filed directly with the superintendent. If the complaint involves the superintendent, the report must be filed directly with the school board. The report will include the facts, a determination of whether the allegations have been substantiated and whether a violation of this policy has occurred, as well as a description of any proposed resolution which may include alternate dispute resolution.
  - (2) Upon completion of the investigation, the human rights officer will inform the complainant/reporter of his or her right to review the written report at the school building where the complainant/reporter is employed or enrolled, in accordance with state and federal law regarding data or records privacy.
  - (3) If the complainant/reporter is a student, the human rights officer will inform the parent/guardian of his or her right to review the written report at the school building where the student reporter is enrolled, in accordance with state and federal law regarding data or records privacy.
  - (4) The school district must comply with federal and state law pertaining to retention of records.

## VII. APPEAL

If the grievance has not been resolved to the satisfaction of the complainant/reporter, s/he may appeal to the human rights officer within ten (10) school days of receipt of the findings of the school district investigation. The school district investigator will conduct a review of the appeal and, within ten (10) school days of receipt of the appeal, will affirm, reverse, or modify the findings of the report. The decision of the school district investigator is final, and action will occur as addressed in VIII below.

## VIII. SCHOOL DISTRICT ACTION

- A. Upon conclusion of the investigation and receipt of the findings, the school district will take appropriate and effective action. If the investigator determined that a violation of this policy has occurred, such action may include, but is not limited to, warning, suspension, exclusion, expulsion, transfer, remediation, termination or discharge. Actions may also include alternative dispute resolution, including restorative justice programs, school or district wide training, counseling, and class transfer. School district action taken for violation of this policy will be consistent with the requirements of applicable collective bargaining agreements, state and federal law, and school district policies.
- B. The result of the school district's investigation of each complaint filed under these procedures will be reported in writing to the complainant by the school district in accordance with state and federal law regarding data or records privacy.

IX. REPRISAL

- A. The school district will take appropriate action against any student, teacher, administrator or other school personnel who retaliates against any person who reports alleged unlawful harassment toward an employee or student or any person who testifies, assists, participates in an investigation or hearing related to alleged unlawful harassment covered by this policy. Reprisal also includes retaliation against a student or district employee who associates with a person or group or persons who are disabled or who are of different race, color, creed, religion, sexual orientation, or national origin. Retaliation includes, but is not limited to, any form of intimidation or harassment. Reprisal is also prohibited based upon a request for a religious or disability accommodation.

X. CONFLICT OF INTEREST

- A. If there is a conflict of interest with respect to any party affected by this policy, appropriate accommodations will be made, such as, but not limited to, appointing or contracting with a neutral third party investigator to conduct the investigation, or recusal from the process by the person for whom a conflict or potential conflict of interest exists.

XI. HARASSMENT OR VIOLENCE AS ABUSE

- A. Under certain circumstances, alleged harassment or violence may also be possible abuse under Minnesota law. If so, the duties of mandatory reporting under Minnesota Statutes, section 626.556 may be applicable.
- B. Nothing in this policy will prohibit the school district from taking immediate action to protect victims of alleged harassment, violence, or abuse.

XII. DISSEMINATION OF POLICY AND TRAINING

- A. This policy must be conspicuously posted throughout each school building in areas accessible to students and staff members.
- B. This policy must be given to each school district employee and independent contractor at the time of entering into the person's employment contract.
- C. This policy must be included in each school's student handbook on school policies.
- D. The school district has developed the following process for discussing the school's harassment and violence policy with students and school district employees: [Insert process to be followed at each school building].
- E. The school board will review this policy annually for compliance with state and federal law.
- F. The school district will post this policy on its website and ensure that it is easily accessible to view and download. If the school district does not have a website, the school district has made the policy accessible for parents and community members by [insert how it is made accessible].



XIII. RIGHT TO ALTERNATIVE COMPLAINT PROCEDURES

- A. These procedures do not deny the right of any individual to pursue other avenues of recourse which may include filing charges with the agencies below, filing a report with a law enforcement agency, or initiating action in state or federal court. For claims of unlawful discrimination/harassment:

Minnesota Department of Human Rights  
Freeman Building  
625 Robert Street North  
St. Paul, MN 55155  
toll free: 800.657.3704  
tty: 651.296.1283  
fax: 651.296.9042  
<http://www.humanrights.state.mn.us>

U.S. Department of Education  
Office for Civil rights, Region V  
500 W. Madison Street- Suite 1475  
Chicago IL 60661  
Tel: 312.730.1560  
TDD: 312.730.1609

## **Employment Discrimination/Harassment**

Equal Employment Opportunity Commission (EEOC)

330 South 2nd Ave., Room 430

Minneapolis, MN 55401

(612) 335-4040

1-800-669-4000

Fax: (612) 335-4044

TTY: (612) 335-4045

[www.eeoc.gov/minneapolis/index.html](http://www.eeoc.gov/minneapolis/index.html)

## **Legal References and Resources**

MDE's Model Policy Web page ([www.education.state.mn.us](http://www.education.state.mn.us) > Welcome to MDE > Policies > Model School and District Policies ) provides links to the Minnesota Department of Human Rights Web page for examples of harassment/discrimination, and to the federal Dear Colleague letters for specific examples of harassment and violence based upon a person's actual or perceived race, color, creed, national origin, religion, sex/gender, sexual orientation, disability, public assistance, or marital status or age.

Minn. Stat. § 121A.03, Subd. 2 (Sexual, Religious and Racial Harassment and Violence Policy)

Minn. Stat. Ch. 363A (Minnesota Human Rights Act)

Minn. Stat. § 609.224 (Assault in the Fifth Degree)

Minn. Stat. § 626.556 *et seq.* (Reporting of Maltreatment of Minors)

42 U.S.C. § 2000e *et seq.* (Title VI of the Civil Rights Act) (Title VI)

20 U.S.C. § 1681, *et. seq.* Title IX of the Education Amendments of 1972 (Title IX)

29 U.S.C. §794 Section 504 of the Rehabilitation Act of 1973 (Section 504)

42 U.S.C. § 12131 *et. seq.* Title II of the American with Disabilities Act of 1990 (Title II)

## **Resources for Definitions and Examples of Discrimination or Harassment**

### *Federal Resources*

Department of Justice: Dear Colleague Letter: Enrollment practices addressing actual or perceived citizenship (2011) (US Department of Justice)

Office of Civil Rights (OCR)

Dear Colleague Letter dated April 4, 2011: Sexual Harassment and Sexual Violence (2011)

Dear Colleague Letter: Bullying and Harassment (2010)

Dear Colleague Letter: Sexual Harassment Issues (2006)

Dear Colleague Letter: Religious Discrimination (2004)

Dear Colleague Letter: First Amendment (2003)

Dear Colleague Letter: Prohibited Disability Harassment (2000)

The OCR Dear Colleague Letters can be viewed on the U.S. Department of Education website: <http://www2.ed.gov/about/offices/list/ocr/publications.html>.

*Harassment and Violence Prohibition Policy*

Sexual Harassment: It's Not academic (Revised 2008)

Sexual Harassment Guidance (revised 2001)

Racial Incidents and harassment against Students (1994)

*State Resource:*

MDH website for more information about the Minnesota Human Rights Act:

<http://www.humanrights.state.mn.us/>.

*Technical Assistance and Training*

U.S. Department of Education, Office of School Support and Technology Programs, Equity Assistance Centers Program (<http://www2.ed.gov/programs/equitycenters/index.html>). As set forth on the website, Centers work with schools in the areas of harassment, bullying, and prejudice reduction. Centers also develop materials, strategies, and professional development activities to assist schools and communities in preventing and countering harassment based on ethnicity or gender. More recently, they provide resources and training in the areas of hate crimes, racial prejudice, and bullying.

Minnesota is in Region V, Programs for Educational Opportunity, University of Michigan, Programs for Educational Opportunity (PEO)

1005 School of Education

Ann Arbor, MI, 48109

Dr. Percy Bates, Director (2008-2011)

Tel: 734.763.9910

Fax: 734.763.2137

Center on Positive Behavioral Interventions and Supports, established by the Office of Special Education Programs, U.S. Department of Education, <http://pbis.org>