

SWAN RIVER MONTESSORI CHARTER SCHOOL

School Board Meeting

Meeting Agenda

Monday August 24 , 2026 at 8:00 a.m.

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

Meeting Minutes

I. CALL TO ORDER in 503 Kitchen at Swan River Montessori Charter School by ____ @ ____AM

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

- a. Motion to approve meeting agenda made by ___, Seconded by ___. Board Vote-

V. PREVIOUS MEETING MINUTES-

- a. Motion to approve 6.15.26 Board Meeting Minutes made by ___, Seconded by ___. Board Vote-

VI. DECLARATION OF CONFLICTS-

VII. FINANCIAL REPORT- NOTES FROM COMMITTEE MEETING

- a. FINANCIAL REPORT
- b. REVIEW OF BILLS
- a. DONATIONS-
 - i. Thrivent Choice donation of \$631

Motion to approve JUNE financials, expenditures and disbursements made by ___, Seconded by ___. Board Vote-

VIII. ENVIRONMENTAL EDUCATION REPORT AS RELATED TO CONTRACTED GOALS-

a.

IX. ACADEMIC PERFORMANCE REPORT AS RELATED TO CONTRACTED GOALS –

a.

X. BOARD TRAINING-

a. Board Self Assessment update

XI. DIRECTOR GOALS

XII. STRATEGIC PLANNING & GOAL SETTING

XIII. OLD BUSINESS

a.

XIV. NEW BUSINESS

a. Establish Board roles

i. Nominations for board roles

1. Chair-

2. Secretary-

3. Treasurer-

ii. **Motion to approve** ____ **as board chair, ____ as Secretary and ____ as Treasurer made by**
__ Seconded by __. Board Vote-

b. Annual Designations:

i. Depository-

ii. Electronic Funds Transfer-

iii. Communication

Motion to approve the above made by __, Seconded by __. Board Vote-

c. Board Resolution for IOWA -

i. **Motion to appoint Annette Vemuri as the IOWA made by __, Seconded by __.**
Board vote-

d. Set Wellness Committee Mtg.- The committee will consist of: _____. Will meet on:

e. Set World's Best Workforce Plan Committee Mtg.- The committee will consist of: _____. Will meet on:

f. New teacher contract

i. **Motion to approve new teacher contract made by __, Seconded by __. Board vote-**

g. Employee Handbook

i. **Motion to approve employee handbook made by __, Seconded by __. Board vote-**

h. Student Handbook

i. Policy Update

j.

XV. REVIEW OF NEXT MEETING AGENDA

- a. Date, Time & Location of next Finance Committee Meeting:
- b. Date, Time & Location of next Board Meeting:

Upcoming Agenda Items-

Old Business

New Business

XVI. MOTION TO ADJOURN at __ A.M. by __, Seconded by __. Board Vote-

SWAN RIVER MONTESSORI CHARTER SCHOOL

School Board Meeting

Meeting Minutes

Monday June 15 , 2026 at 9:00 a.m.

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

Meeting Minutes

**I. CALL TO ORDER in 503 Kitchen at Swan River Montessori Charter School by __JV__
@__8:55__ PM**

II. ROLL CALL

- a. Board Members Present: Julie Halvorson, Amy Savage, Nicole Perez, Amy Jensen, Jana Evink, Claire Belknap, Rick Freese
- b. Board Members Absent: none
- c. Other Attendees: School Director Annette Vemuri
- 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 made by _JH_, Seconded by AS_. Board Vote- all aye, motion carried

V. PREVIOUS MEETING MINUTES- Motion to approve 5.19.26 Board Meeting Minutes with clarification on the sped director contract discussion made by CB_, Seconded by _RF_. Board Vote- all aye, motion carried

VI. DECLARATION OF CONFLICTS- none

VII. SWEARING IN OF NEW BOARD MEMBERS

VIII. FINANCIAL REPORT- NOTES FROM COMMITTEE MEETING

FINANCIAL REPORT

\$836,950 Cash balance at end of the month

- \$192,148 State receivables which represents an initial estimate for the beginning of the accrual for the current year hold back

- -\$ State receivables which represents the remaining amount due to the school from the state 10% holdback of the prior school year
- \$152,133 Salary and benefits payables estimated. This is for summer salaries as of month-end.

Adopted Budget: 165 ADM

Revised Budget: 165 ADM

Actual ADM 170.68

- 92% Percent of the fiscal year completed
- 92% YTD revenue as a percent of budget based on the working budget.
- 93% YTD expenses as a percent of budget based on the working budget.
- \$893,722 Projected year end fund balance
- 34% Projected ending fund balance as a % of expense budget

Cash Flow:

Estimated cash balance as of June 30, 2026

\$807,286\$

Days cash on hand projected as of June 30, 2026

118

Question from JE-

- a. Revenue federal aid: Last month showed XXX in April and now shows XX in May. Kyle said it can be a change in the formula used by Bridget being different from what he used. Asked Kyle to send an email when he figures it out. PAGE 13
- b. Revisited field trip budget- Kyle will update

REVIEW OF BILLS

- a. 2 Federal payments on 5/21/26. Looks like 2 payroll taxes got entered on the same day. This is when they were entered but not necessarily paid.

Motion to approve May financials, expenditures and disbursements made by_JH_, Seconded by AS__. Board Vote- all aye, motion carried

IX. Donations- None

X. ENVIRONMENTAL EDUCATION REPORT AS RELATED TO CONTRACTED GOALS-

- a. Final scores for EE Goals- board reviewed the EE results. Board was impressed by depth and quality of the report. Board congratulates the EE team and the students on their hard work meeting and exceeding their goals.

XI. ACADEMIC PERFORMANCE REPORT AS RELATED TO CONTRACTED GOALS –

- a. Fastbridge Testing Update- Director Annette presented the final FY26 data
 - i. For FY27 focus on math, aligning new math standards with Montessori curriculum and seeing what needs to be done to bring up scores
 - ii. Director presented data charts tracking individual student scores across grades as they moved through the school. Many students moved from high risk/some risk to low risk/college pathway by sixth grade for both reading and math which shows that our Montessori and RTI programs are effective
 - iii. SRMCS Met or Exceeded goals for Osprey Wilds

Contract Goals - Reading

		Points	Result
Performance Ratings	Measure 3.3 [RG3]: From FY26 to FY30, the aggregate percentage of K-1 students that are "Low Risk" on the spring FastBridge assessment, OR from fall to spring move from "High Risk" to "Some Risk" will be at least 55%	3	
Exceeds Target (x 1.5)	The aggregate percentage is at least 65%.		
Meets Target (x1.0)	The aggregate percentage is at least 55%.		
Approaches Target (x0.5)	The aggregate percentage is at least 45%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points	Result
Performance Ratings	Measure 3.4 [RG3]: From FY26 to FY30, the aggregate percentage of 2-6 students that are "Low Risk" on the spring FastBridge assessment, OR from fall to spring move from "High Risk" to "Some Risk" will be at least 55%	9	
Exceeds Target (x 1.5)	The aggregate percentage is at least 65%.		
Meets Target (x1.0)	The aggregate percentage is at least 55%.		
Approaches Target (x0.5)	The aggregate percentage is at least 45%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

65% - Meets target

72% - Exceeds target

Contract Goals - Math

Performance Ratings	Measure 4.3 [CCR]: From FY26 to FY30, the aggregate percentage of K-1 students that are "Low Risk" on the spring FastBridge assessment, OR from fall to spring move from "High Risk" to "Some Risk" will be at least 55%	3	
Exceeds Target (x 1.5)	The aggregate percentage is at least 65%.		
Meets Target (x1.0)	The aggregate percentage is at least 55%.		
Approaches Target (x0.5)	The aggregate percentage is at least 45%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points	Result
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Exceeds Target (x 1.5)	The aggregate percentage is at least 65%.		
Meets Target (x1.0)	The aggregate percentage is at least 55%.		
Approaches Target (x0.5)	The aggregate percentage is at least 45%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

62% - Meets target

68% - Exceeds target

XII. BOARD TRAINING-

- Board will complete self assessment at August meeting. Jana will send it out in July to all board members
- Board still has questions about how often training needs to be done after the initial training
- CB suggests the board looks into training on Cultural Competency

XIII. DIRECTOR GOALS

- Direct Letter of Employment. SRMCS is pleased to offer a letter of employment to Director Annette Vemuri for the 2026-2027 school year.
Motion to approve FY27 Director Letter of Employment made by RF_, Seconded by _JH_. Board Vote- all aye, motion carried

XIV. STRATEGIC PLANNING & GOAL SETTING

XV. OLD BUSINESS

- 721 Uniform Grant Guidance Policy Regarding Federal Revenue Sources. **TABLE TO AUGUST**

- i. **Motion to approve made by __, Seconded by __. Board Vote-**
- b. Update on contract for Special Education Director- Because the sped director is a contracted service, SRMCS cannot put in the contract that she be onsite 3 days a week. If she would need to attend virtual meetings or take phone calls for her other schools she would be double dipping. Need to keep the contract as hours she will work.
 - i. **Motion to approve Special Education Director without 3 days onsite and as hours served made by CB_, Seconded by _AS_. Board Vote- all aye, motion carried**

XVI. NEW BUSINESS

- a. Osprey Wilds Contract and related Exhibits. Director Annette will contact OW about the following:
 - i. 1. the district number is wrong on the title page. Our district is 4137-07
 - ii. seems like things are missing from section 14 page 36
 - iii. on page 36 section 15 needs to start a new paragraph
 - iv. goals 3.3 and 3.4. Add the word grades to K-1 and 2-6.
 - v. seems like a weird spot to put our admissions policy on page 56. between exhibit H and J
 - vi. Amy Bergquist (spelled wrong) and not the updated board terms for Jana, Amy J, Amy S and Rick. On page 64

Motion to approve Swan River's contact with Osprey Wilds with the clarifications/change noted above made by CB_, Seconded by _RF_. Board Vote- all aye, motion carried
- b. Contract with the Monticello Community Center. Director Annette worked with the MCC to revise the previous proposed contract to one that met the needs of SRMCS and uses our lease aid without additional funds from the general school budget. The board wants the following corrections and clarifications:

This section is confusing. The yellow is a misspelling
It states that we will pay \$5,000 for snow removal. However, it was changed to \$4,435.

*Repairs and Maintenance. The City and School agree that the City will be responsible for any and all repair and maintenance of the Licensed Premises during the term of this Agreement. Maintenance shall include, but not be limited to, keeping the Licensed Premises clean of litter or trash, snow removal and mowing **cons1stent** with the City's policies for parking lots serving the Monticello Community Center. The School shall be responsible for reimbursement of the City's costs for snowplowing the Licensed Premises in the amount \$5,000.00 during the term of this Agreement.*

Please clarify that the \$4,435 is for all of the following parking, snow removal and maintenance.

Motion to approve SRMCS's contract with the MCC with the clarifications/change noted above made by _AS, Seconded by CB_. Board Vote- all aye, motion carried

- c. Set Dates and Time for FY 27 School Board Meetings- third Monday of every month at 2:15 PM August - June unless otherwise noted below
 - i. August 17, 2026 8:30 AM
 - ii. September 21, 2026
 - iii. October 19, 2026
 - iv. November 16, 2026
 - v. December 21, 2026
 - vi. January 18, 2027
 - vii. February 22, 2027
 - viii. March 15, 2027
 - ix. April 19, 2027
 - x. May 10, 2027
 - xi. June 21, 2027 8:30 AM

XVII. REVIEW OF NEXT MEETING AGENDA

- a. Date, Time & Location of next Finance Committee Meeting: see above, finance committee meeting will take place just before the board meeting each month
- b. Date, Time & Location of next Board Meeting: see above

Upcoming Agenda Items-

Old Business

Review Crisis Management Policy

721 Uniform Grant Guidance Policy Regarding Federal Revenue Sources

New Business

XVIII. MOTION TO ADJOURN at _10:37_ A.M. by AS_, Seconded by_RF_. Board Vote- all aye, motion carried

Swan River Montessori Finance Report

July 31, 2026



Financial Highlights

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:

- \$832,455 Cash balance at end of the month
- \$267,939 State Receivables which represents an initial estimate for the beginning of the accrual for the FY27 hold back (10%) and funds due from FY26
- \$0 Federal Receivables which represents prior year funds due
- \$42,913 Accounts Payable balances as of the end of the month
- \$58,939 Salary and Benefits Payables
- \$0 Summer Salary and Benefits Payables Estimated
- \$0 Short-Term Debt, Current line of credit balance

Income Statement

The focus of the school's income statement is to monitor the ongoing revenues and expenses of the various programs. A

- Adopted Budget 172ADM
- 8% Percent of the fiscal year completed
- 7% YTD revenue as a percent of budget based on the proposed budget
- 4% YTD expenses as a percent of budget based on the proposed budget
- \$923,909 Projected year end Fund Balance
- 33% Projected Ending fund balance as a % of Expense Budget

Cash Flow:

- Hold back has been updated on cash flow based on estimates
- 129 Days Cash on Hand at 6.30.26
- \$ 172,917 Current MDE projected payments semi-monthly

Notes to Financials

- 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.
- Accounts Payable balances as of the end of the month
- Salary and Benefits Payables estimated. This is for summer salaries as of month-end.
- This report is unaudited and is prepared for internal use only, excludes GAAP disclosures.
- FY26 audit is scheduled for September. Final reconciliations will affect beginning fund balances.

Swan River Montessori
Dashboard Summary
July 31, 2026

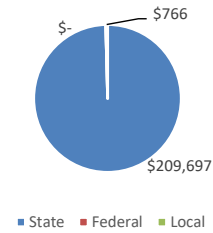
Revenue

	Adopted Budget	YTD	% Budget
State	\$ 2,517,365	\$ 209,697	8%
Federal	\$ 34,235	\$ -	0%
Local	\$ 39,000	\$ 766	2%
Total	\$ 2,590,600	\$ 210,462	8%

Budget
\$ 2,590,600

% of Year
8.33%

Revenue Sources



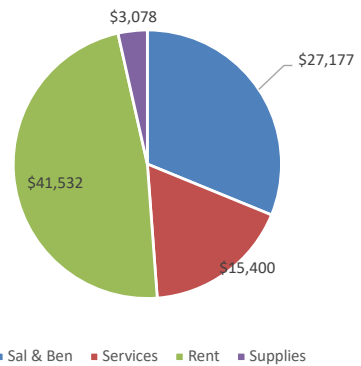
Sustainability - YTD

	YTD \$	% Budget	Beg of Year	% Budget
Cash	832,455	32%	813,449	31%
Fund Balance	998,942	39%	890,078	35%

Expenditures

	Adopted Budget	YTD	% Budget
Sal & Ben	\$ 1,545,978	\$ 27,177	2%
Services	\$ 636,036	\$ 15,400	2%
Rent	\$ 239,633	\$ 41,532	17%
Supplies	\$ 88,641	\$ 3,078	3%
Capital Expenditures	\$ -	\$ -	0%
Other	\$ 40,673	\$ 13,002	32%
Total	\$ 2,550,961	\$ 100,190	4%

Expenditure by Catagory



Sustainability - Projected

DCOH	Projected	Goal	Compliance
Cash	\$ 899,523	\$ 629,004	*with \$0 Loc*
# Days	128.71	90.00	

Enrollment	ADM
Adopted	172
Actual - Proj	172
MDE Pay On	175

SWAN RIVER MONTESSORI
Balance Sheet
July 31, 2026

		Current Year
		July 31, 2026
Assets		
Cash	\$	832,455
Due from State - Unaudited		267,939
Prepays		400
Total Assets	\$	1,100,794
Liabilities		
Salary and Benefits Payable	\$	58,939
Accounts Payable		42,913
Total Liabilities	\$	101,852
Fund Balance		
Beginning- Unaudited (Unrestricted)	\$	814,310
Beginning Unaudited (Restricted)	\$	75,768
Change in Fund Balance		108,864
Ending- Unaudited	\$	998,942
Liabilities and Fund Balance Total	\$	1,100,794

SWAN RIVER MONTESSORI
Income Statement Summary
July 31, 2026

	Adopted Budget 172 ADM	Year to Date Activity	% of Adopted Budget
GENERAL FUND			
Revenues			
State Aid	\$ 2,517,365	\$ 209,697	8.3%
Federal Aid	34,235	-	0.0%
Local Aid	39,000	766	2.0%
Total Revenues	\$ 2,590,600	\$ 210,462	8.1%
Expenditures			
Salary	\$ 1,210,868	\$ 5,685	0.5%
Benefits	335,110	21,493	6.4%
Purchased Services	636,036	15,400	2.4%
Supplies and Materials	88,641	3,078	3.5%
Capital Expenditures	239,633	41,532	17.3%
Other Expenses	40,673	13,002	32.0%
Total Expenditures	2,550,961	\$ 100,190	3.9%
Change in Fund Balance	\$ 39,639	\$ 110,272	
FOOD SERVICE FUND			
Revenues	\$ 133,230	\$ -	0.0%
Expenditures	\$ 138,475	\$ -	0.0%
Change in Fund Balance	\$ (5,245)	\$ -	
COMMUNITY ED FUND			
Revenues	\$ 134,033	\$ -	0.0%
Expenditures	\$ 134,596	\$ 1,408	1.0%
Change in Fund Balance	\$ (563)	\$ (1,408)	
Total Change in Fund Balance	\$ 33,831	\$ 108,864	
Beginning- Unaudited (Unrestricted)	\$ 890,078	890,078	
Total Change in Fund Balance	\$ 33,831	108,864	
Projected Fund Balance	\$ 923,909	998,942	
% Fund Balance	32.72%	35.37%	

Unaudited and based on administrative and contractor estimates.

SWAN RIVER MONTESSORI

Detail Revenue

July 31, 2026

FYTD: 8%

	Adopted Budget 172 ADM	Monthly Activity	Year to Date Activity	% of Adopted Budget
General Fund				
State Aid				
General Aid	\$ 1,431,320	\$ 172,693	\$ 172,693	12.1%
Special Ed	801,277	-	-	0.0%
Lease Aid	215,669	-	-	0.0%
Other State Payments	49,099	-	-	0.0%
Student Support Aid	20,000	-	-	0.0%
State Aid Receivable	-	-	37,003	N/A
Total State Aid	\$ 2,517,365	\$ 172,693	\$ 209,697	8.3%
Federal Aid				
Title II	\$ 11,049	-	\$ -	0.0%
Federal Special Ed	23,186	-	-	0.0%
Total Federal	\$ 34,235	\$ -	\$ -	0.0%
Local Aid and Donation				
Student Activity Fees	13,000	-	-	0.0%
Donations and Other	500	95	95	19.0%
MA Billing	20,000	-	-	0.0%
Interest Earnings	5,000	671	671	13.4%
Total Local	\$ 39,000	\$ 766	\$ 766	2.0%
General Fund Revenue				
	\$ 2,590,600	\$ 173,459	\$ 210,462	8.1%
Food Service Revenue				
Federal Revenue	83,648	-	-	0.0%
State Revenue	35,704	-	-	0.0%
Transfer from GF	13,878	-	-	0.0%
Food Service Revenue	\$ 133,230	\$ -	\$ -	0.0%
Community Ed Revenue				
Before/After School Care	\$ 41,208	\$ -	\$ -	0.0%
Preschool Tuition	92,825	-	-	N/A
Community Ed Revenue	\$ 134,033	\$ -	\$ -	0.0%
Total Revenues All Funds				
	\$ 2,857,863	\$ 173,459	\$ 210,462	7.4%

SWAN RIVER MONTESSORI

**Detail Expense
July 31, 2026**

FYTD: 8%

	Adopted Budget 172 ADM	Monthly Activity	Year to Date Activity	% of Adopted Budget
General Fund				
Admin and Operation				
100 Salaries	\$ 108,739	\$ 3,711	\$ 3,711	3.4%
200 Benefits	48,557	21,068	21,068	43.4%
305 Contracted Services - Admin	144,339	6,672	6,672	4.6%
315 Tech Repair.Maintenance	5,000	1,706	1,706	34.1%
320 Communication	6,394	-	-	0.0%
329 Postage	914	-	-	0.0%
330 Utility	41,141	3,131	3,131	7.6%
340 Insurance	31,809	2,691	2,691	8.5%
350 Repairs & Maintenance	2,123	-	-	0.0%
366 Travel & Conferences	5,306	-	-	0.0%
401 General Supplies	24,359	258	258	1.1%
405 Purchased Software	7,650	1,248	1,248	16.3%
490 Food	1,020	-	-	0.0%
570 Building Lease	239,633	41,532	41,532	17.3%
820 Dues & Memberships	23,095	10,357	10,357	44.8%
899 Misc. Expense/Xfer to FSF	14,428	2,645	2,645	18.3%
Total Admin and Operation	\$ 704,507	\$ 95,018	\$ 95,018	13.5%
Instruction				
100 Salaries	\$ 659,611	\$ -	\$ -	0.0%
200 Benefits	171,498	-	-	0.0%
360 Transportation	13,842	-	-	0.0%
366 Professional Development	6,946	-	-	0.0%
401 General Supplies	14,939	-	-	0.0%
406 Purchased Software	3,000	1,573	1,573	52.4%
430 Instructional Supplies	28,869	-	-	0.0%
461 Standardized Tests	2,811	-	-	0.0%
820 Dues & Memberships	3,150	-	-	0.0%
Total Instruction	\$ 904,666	\$ 1,573	\$ 1,573	0.2%
Special Education				
100 Salaries	\$ 433,172	\$ 1,974	\$ 1,974	0.5%
200 Benefits	112,625	425	425	0.4%
305 Contracted Services	27,605	1,200	1,200	4.3%
366 Travel & Conferences	1,210	-	-	0.0%
394 Pmt. to Other Districts	329,407	-	-	0.0%
401 General Supplies	3,570	-	-	0.0%
405 Purchased Software	2,423	-	-	0.0%
Total Special Ed	\$ 910,012	\$ 3,599	\$ 3,599	0.4%

Title II					
100 Salaries	\$	9,346	\$	-	\$ - 0.0%
200 Benefits		2,430		-	- 0.0%
Total Title II	\$	11,776	\$	-	\$ - 0.0%
Student Support Aid					
303 Contracted Services		20,000		-	- 0.0%
Total Student Support Aid	\$	20,000	\$	-	\$ - 0.0%
Total General Fund Expenditures	\$	2,550,961	\$	100,190	\$ 100,190 0.0%
Food Service Fund					
490 Food		138,475		-	- 0.0%
Total Food Service Fund	\$	138,475	\$	-	\$ - 0.0%
Community Ed Fund					
100 Salaries	\$	105,218	\$	1,156	\$ 1,156 1.1%
200 Benefits		27,356		252	252 0.9%
369 Field Trips		248		-	- 0.0%
401 General Supplies		1,519		-	- 0.0%
820 Dues & Memberships		255		-	- 0.0%
Total Community Ed Fund		134,596		1,408	1,408 1.0%
Total Expenditures All Funds	\$	2,824,032	\$	101,598	\$ 101,598 3.6%

SWAN RIVER MONTESSORI
CashFlow FY27

Cash Receipts	Adopted Budget	Year to Date	August	September	October	November	December	January	February
State Aids- CY	\$ 2,827,430	\$ 172,693	\$ 215,636	\$ 215,636	\$ 215,636	\$ 215,636	\$ 215,636	\$ 215,636	\$ 215,636
State Aids- PY	230,936	-	69,281	92,374	46,187	-	-	11,547	-
Federal Aids	34,235	-	-	-	3,804	3,804	3,804	3,804	3,804
Local	39,000	766	-	1,000	-	1,000	-	1,000	-
Food Service	133,230	-	-	-	-	-	-	-	-
Community Ed	134,033	-	-	13,403	13,403	13,403	13,403	13,403	13,403
Total Inflows	\$ 3,456,838	\$ 227,933	\$ 284,917	\$ 322,414	\$ 279,030	\$ 233,843	\$ 232,843	\$ 245,390	\$ 232,843
Expense									
Salary & Benefits	\$ 1,545,978	\$ 27,177	\$ 114,180	\$ 114,180	\$ 114,180	\$ 114,180	\$ 114,180	\$ 114,180	\$ 114,180
Purchased Services	636,036	15,400	12,000	60,864	60,864	60,864	60,864	60,864	60,864
Supplies and Materials	88,641	3,078	10,000	7,840	7,840	7,840	7,840	7,840	7,840
Capital Expenditures	-	-	-	-	-	-	-	-	-
Lease	239,633	41,532	19,969	19,969	19,969	19,969	19,969	19,969	19,969
Other Expenses	40,673	13,002	-	15,000	-	-	-	-	-
Food Service	138,475	-	7,500	14,275	14,275	14,275	14,275	14,275	14,275
Community Ed	134,596	1,408	12,108	12,108	12,108	12,108	12,108	12,108	12,108
Accounts and Lease Payable	-	-	-	-	-	-	-	-	-
Total Outflows	\$ 2,824,032	\$ 101,598	\$ 175,758	\$ 244,237	\$ 229,237	\$ 229,237	\$ 229,237	\$ 229,237	\$ 229,237
Change in Cash			\$ 109,159	\$ 78,177	\$ 49,793	\$ 4,606	\$ 3,606	\$ 16,153	\$ 3,606
Revenues and Expenses based on working projections.									
Beginning			\$ 584,536	\$ 693,695	\$ 771,872	\$ 821,665	\$ 826,272	\$ 829,878	\$ 846,031
Line of Credit			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Ending- Projected			\$ 693,695	\$ 771,872	\$ 821,665	\$ 826,272	\$ 829,878	\$ 846,031	\$ 849,637
Line of Credit Balance			-	-	-	-	-	-	-

11 Months Remaining

March	April	May	June	Total	Budget	Remaining
\$ 215,636	\$ 215,636	\$ 215,636	\$ 215,636	\$ 2,544,687	\$ 2,827,430	\$ 282,743
-	-	11,547	-	230,936	230,936	-
3,804	3,804	3,804	3,804	34,235	34,235	-
1,000	-	-	1,000	5,766	39,000	33,234
-	-	-	-	-	133,230	133,230
13,403	13,403	13,403	13,403	134,033	134,033	-
\$ 233,843	\$ 232,843	\$ 244,390	\$ 233,843	\$ 3,004,131	\$ 3,456,838	\$ 452,707
\$ 114,180	\$ 114,180	\$ 114,180	\$ 114,180	\$ 1,283,162	\$ 1,545,978	\$ 262,816
60,864	60,864	60,864	60,864	636,036	636,036	-
7,840	7,840	7,840	5,000	88,641	88,641	-
-	-	-	-	-	-	-
19,969	19,969	19,969	-	241,226	239,633	(1,593)
-	-	-	12,671	40,673	40,673	(0)
14,275	14,275	14,275	2,500	138,475	138,475	-
12,108	12,108	12,108	12,108	134,596	134,596	-
			-	-	-	-
\$ 229,237	\$ 229,237	\$ 229,237	\$ 207,323	\$ 2,562,809	\$ 2,824,032	\$ 261,223
\$ 4,606	\$ 3,606	\$ 15,153	\$ 26,520			
\$ 849,637	\$ 854,244	\$ 857,850	\$ 873,003			
\$ -	\$ -	\$ -	\$ -			
\$ 854,244	\$ 857,850	\$ 873,003	\$ 899,523			

Unaudited and based on administrative and contractor estimates.

Swan River Montessori Supplemental Report

July 31, 2026



Detail Payment Register By Check

Check Number: 0-2147483647 Payment Date: 7/1/2026-7/31/2026 Period: 202701-202701 Void Status: N

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type			
SHBC	1053			City of Monticello		Wire			
			E 01 005 810 000 000 330	Water & Sewer	05/01/26-06/01/26	503 Maple St	\$78.81		
PO#:	Voucher #:	14981	Invoice	Invoice No:	DT070126	7/3/2026	Paid Amt:	\$78.81	
			E 01 005 810 000 000 330	Water & Sewer	500 Maple St	05/01/26-06/01/26	\$242.47		
PO#:	Voucher #:	14982	Invoice	Invoice No:	DT070126	7/3/2026	Paid Amt:	\$242.47	
							Check Amount:	\$321.28	
SHBC	1644			Nelnet		Wire			
			E 01 005 110 000 000 305	Payment Processing Fees	-TSYS Fees		\$30.00		
PO#:	Voucher #:	14983	Invoice	Invoice No:	DT070226	7/3/2026	Paid Amt:	\$30.00	
							Check Amount:	\$30.00	
SHBC	1001			PERA		Wire			
			B 01 215 007	PERA			\$672.02		
PO#:	Voucher #:	14943	Invoice	Invoice No:	S2026240	7/15/2026	Paid Amt:	\$672.02	
							Check Amount:	\$672.02	
SHBC	1002			TRA		Wire			
			B 01 215 006	TRA			\$6,145.29		
PO#:	Voucher #:	14944	Invoice	Invoice No:	S2026240	7/15/2026	Paid Amt:	\$6,145.29	
							Check Amount:	\$6,145.29	
SHBC	1052			Centerpoint Energy		Wire			
			E 01 005 810 000 000 330	Gas Charges	500 Maple	05/07/26-06/08/26	\$229.02		
PO#:	Voucher #:	14986	Invoice	Invoice No:	DT070826	7/15/2026	Paid Amt:	\$229.02	
			E 01 005 810 000 000 330	Gas Charges	503 Maple St	05/07/26-06/06/26	\$26.99		
PO#:	Voucher #:	14985	Invoice	Invoice No:	DT070826	7/15/2026	Paid Amt:	\$26.99	
							Check Amount:	\$256.01	
SHBC	1369			EMC Insurance Companies		Wire			
			E 01 005 940 000 000 340	Property insurance			\$2,695.95		
			E 01 005 940 000 000 340	Invoice Fee			(\$5.00)		
PO#:	Voucher #:	14988	Invoice	Invoice No:	7002839806	7/15/2026	Paid Amt:	\$2,690.95	
							Check Amount:	\$2,690.95	
SHBC	1566			IRS		Wire			
			B 01 215 002	Federal Tax			\$7,880.43		
PO#:	Voucher #:	14945	Invoice	Invoice No:	S2026240	7/15/2026	Paid Amt:	\$7,880.43	
							Check Amount:	\$7,880.43	

Detail Payment Register By Check

8/18/2026

11:09 AM

Check Number: 0-2147483647 Payment Date: 7/1/2026-7/31/2026 Period: 202701-202701 Void Status: N

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type
SHBC	1567			MN Dept. Revenue		Wire
			B 01 215 003	State Tax		\$1,267.26
PO#:	Voucher #:	14942	Invoice	Invoice No: S2026240	7/15/2026	Paid Amt: \$1,267.26
						Check Amount: \$1,267.26
SHBC	1616			MedSurety		Wire
			B 01 215 016	Payroll Deductions-Vision		\$690.02
PO#:	Voucher #:	14941	Invoice	Invoice No: S2026240	7/15/2026	Paid Amt: \$690.02
						Check Amount: \$690.02
SHBC	1616			MedSurety		Wire
			E 01 005 110 000 000 305	HSA Fee		\$36.00
PO#:	Voucher #:	14984	Invoice	Invoice No: 53722	7/15/2026	Paid Amt: \$36.00
						Check Amount: \$36.00
SHBC	1050			SRCS Building Co		Wire
			E 01 005 850 000 348 570	Lease -July		\$16,531.67
PO#:	Voucher #:	14989	Invoice	Invoice No: DT071526	7/21/2026	Paid Amt: \$16,531.67
						Check Amount: \$16,531.67
SHBC	1054			Xcel Energy		Wire
			E 01 005 810 000 000 330	Electric Charges 05/06/26-06/06/26		\$1,916.02
PO#:	Voucher #:	14990	Invoice	Invoice No: DT071626	7/21/2026	Paid Amt: \$1,916.02
						Check Amount: \$1,916.02
SHBC	1001			PERA		Wire
			B 01 215 007	PERA		\$315.00
PO#:	Voucher #:	14972	Invoice	Invoice No: S2027010	7/31/2026	Paid Amt: \$315.00
			B 01 215 007	PERA		\$185.51
PO#:	Voucher #:	14977	Invoice	Invoice No: S2026241	7/31/2026	Paid Amt: \$185.51
						Check Amount: \$500.51
SHBC	1002			TRA		Wire
			B 01 215 006	TRA		\$4,735.57
PO#:	Voucher #:	14978	Invoice	Invoice No: S2026241	7/31/2026	Paid Amt: \$4,735.57
						Check Amount: \$4,735.57
SHBC	1109			MACS (MN Ass of Charter Schls)		Wire
			E 01 005 010 000 000 820	MACS July		\$272.93
PO#:	Voucher #:	14987	Invoice	Invoice No: DT071026	7/31/2026	Paid Amt: \$272.93
						Check Amount: \$272.93

Check Number: 0-2147483647 Payment Date: 7/1/2026-7/31/2026 Period: 202701-202701 Void Status: N

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type			
SHBC	1566			IRS		Wire			
			B 01 215 002	Federal Tax			\$5,508.33		
PO#:	Voucher #:	14979	Invoice	Invoice No: S2026241	7/31/2026	Paid Amt:	\$5,508.33		
			B 01 215 002	Federal Tax			\$1,155.38		
PO#:	Voucher #:	14974	Invoice	Invoice No: S2027010	7/31/2026	Paid Amt:	\$1,155.38		
						Check Amount:	\$6,663.71		
SHBC	1567			MN Dept. Revenue		Wire			
			B 01 215 003	State Tax			\$184.12		
PO#:	Voucher #:	14971	Invoice	Invoice No: S2027010	7/31/2026	Paid Amt:	\$184.12		
						Check Amount:	\$184.12		
SHBC	1616			MedSurety		Wire			
			B 01 215 016	Payroll Deductions-Vision			\$283.34		
PO#:	Voucher #:	14970	Invoice	Invoice No: S2027010	7/31/2026	Paid Amt:	\$283.34		
			B 01 215 016	Payroll Deductions-Vision			\$406.68		
PO#:	Voucher #:	14975	Invoice	Invoice No: S2026241	7/31/2026	Paid Amt:	\$406.68		
						Check Amount:	\$690.02		
SHBC	1222			Blue Cross/Blue Shield of MN		Wire			
			B 01 215 009	Insurance Premiums-Dental			\$321.86		
PO#:	Voucher #:	15004	Invoice	Invoice No: DT072126	7/31/2026	Paid Amt:	\$321.86		
						Check Amount:	\$321.86		
SHBC	1530			Sherburne State Bank		Wire			
			E 01 005 110 000 000 305	Service Fee July			\$35.00		
PO#:	Voucher #:	15005	Invoice	Invoice No: DT073126	7/31/2026	Paid Amt:	\$35.00		
						Check Amount:	\$35.00		
SHBC	1572			MN Unemployment Insurance		Wire			
			E 01 005 110 000 000 280	MN UI			\$13,291.00		
PO#:	Voucher #:	15003	Invoice	Invoice No: DT063026	7/31/2026	Paid Amt:	\$13,291.00		
						Check Amount:	\$13,291.00		
SHBC	1720			MN PL		Wire			
			B 01 215 022	MN PL Fune			\$2,920.91		
PO#:	Voucher #:	15002	Invoice	Invoice No: DT063026	7/31/2026	Paid Amt:	\$2,920.91		
						Check Amount:	\$2,920.91		
SHBC	1184			US Bank - Credit Card		Wire			
			E 01 005 105 000 000 899	US Bank CC			\$448.66		
PO#:	Voucher #:	15017	Invoice	Invoice No: DT071026	7/31/2026	Paid Amt:	\$448.66		
						Check Amount:	\$448.66		

Detail Payment Register By Check

8/18/2026

11:09 AM

Check Number: 0-2147483647 Payment Date: 7/1/2026-7/31/2026 Period: 202701-202701 Void Status: N

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type
SHBC	1288			M & M Carpet Cleaning		Wire
			E 01 005 810 000 000 305	Carpet and Rug Cleaning		\$1,475.00
PO#:	Voucher #:	15016	Invoice	Invoice No: DT070726	7/31/2026	Paid Amt: \$1,475.00
						Check Amount: \$1,475.00
SHBC	1530			Sherburne State Bank		Wire
			E 01 005 105 000 000 899	Sherburne CC Statement		\$2,196.82
PO#:	Voucher #:	15018	Invoice	Invoice No: DT072026	7/31/2026	Paid Amt: \$2,196.82
						Check Amount: \$2,196.82
SHBC	1567			MN Dept. Revenue		Wire
			B 01 215 003	State Tax		\$881.92
PO#:	Voucher #:	14976	Invoice	Invoice No: S2026241	7/31/2026	Paid Amt: \$881.92
						Check Amount: \$881.92
SHBC	1002			TRA		Wire
			B 01 215 006	TRA		\$817.50
PO#:	Voucher #:	14973	Invoice	Invoice No: S2027010	7/31/2026	Paid Amt: \$817.50
						Check Amount: \$817.50
SHBC	18967 1204			Adam's Pest Control, Inc.		Check
			E 01 005 810 000 000 305	Prevention Plus		\$88.40
PO#:	Voucher #:	14948	Invoice	Invoice No: 4542111	7/17/2026	Paid Amt: \$88.40
						Check Amount: \$88.40
SHBC	18968 1222			Blue Cross/Blue Shield of MN		Check
			B 01 215 016	Insurance Premiums June		\$78.04
PO#:	Voucher #:	14949	Invoice	Invoice No: 260701421691	7/17/2026	Paid Amt: \$78.04
						Check Amount: \$78.04
SHBC	18969 1283			City View Electric Inc.		Check
			E 01 005 810 000 000 305	Annual Fire Monitoring 07/01/26-07/01/27		\$336.00
PO#:	Voucher #:	14952	Invoice	Invoice No: 702939	7/17/2026	Paid Amt: \$336.00
						Check Amount: \$336.00
SHBC	18970 1612			Colonial Life		Check
			B 01 215 011	Supplemental Benefits		\$61.84
PO#:	Voucher #:	14950	Invoice	Invoice No: 5714381-0601004	7/17/2026	Paid Amt: \$61.84
						Check Amount: \$61.84
SHBC	18971 1704			Coordinated Business Systems, LTD		Check
			E 01 005 110 000 000 465	Print Services		\$257.71
PO#:	Voucher #:	14951	Invoice	Invoice No: INV550651	7/17/2026	Paid Amt: \$257.71
						Check Amount: \$257.71

Transactional & Supplemental Data

5

Board Use

Detail Payment Register By Check

Check Number: 0-2147483647 Payment Date: 7/1/2026-7/31/2026 Period: 202701-202701 Void Status: N

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type
SHBC	18972	1482		Designs for Learning INC		Check
			E 01 005 110 000 000 305	HR May		\$52.50
PO#:	Voucher #:	14953	Invoice	Invoice No: 26-2178	7/17/2026	Paid Amt: \$52.50
						Check Amount: \$52.50
SHBC	18973	1636		EdFinMN		Check
			E 01 005 110 000 000 305	Accounting/Consulting Fees -July		\$4,760.00
PO#:	Voucher #:	14955	Invoice	Invoice No: 19141	7/17/2026	Paid Amt: \$4,760.00
						Check Amount: \$4,760.00
SHBC	18974	1618		MN PEIP		Check
			B 01 215 015	Health Insurance -July		\$7,187.52
PO#:	Voucher #:	14956	Invoice	Invoice No: 1641839	7/17/2026	Paid Amt: \$7,187.52
						Check Amount: \$7,187.52
SHBC	18975	1661		Nova Education Consultants		Check
			E 01 010 420 000 419 303	SpEd Services 06/14/26-07/01/26		\$6,000.00
PO#:	Voucher #:	14957	Invoice	Invoice No: 4707	7/17/2026	Paid Amt: \$6,000.00
						Check Amount: \$6,000.00
SHBC	18976	1258		Premier Kitchen, Inc.		Check
			E 02 005 770 000 701 490	Lunch 11/01/25-11/15/25		\$3,770.24
			E 02 005 770 000 705 490	Breakfast 11/01/25-11/15/25		\$1,825.00
			E 02 005 770 000 701 401	Supplies		\$195.00
			R 02 005 770 000 701 601	Commodity		(\$500.00)
PO#:	Voucher #:	14969	Invoice	Invoice No: 40583	7/17/2026	Paid Amt: \$5,290.24
						Check Amount: \$5,290.24
SHBC	18977	1698		Rebecca McMullens		Check
			E 01 005 110 000 000 305	MARRS June		\$255.00
PO#:	Voucher #:	14960	Invoice	Invoice No: 872	7/17/2026	Paid Amt: \$255.00
						Check Amount: \$255.00
SHBC	18978	1703		Renaissance Learning Inc		Check
			E 01 010 203 000 000 406	FastBridge Subscription		\$1,573.00
PO#:	Voucher #:	14961	Invoice	Invoice No: INV5704827	7/17/2026	Paid Amt: \$1,573.00
						Check Amount: \$1,573.00
SHBC	18979	1708		That Sounds Fun Speech Therapy, LLC		Check
			E 01 010 401 000 740 394	Speech 06/09/26-06/23/26 5.5h @ \$120		\$660.00
PO#:	Voucher #:	14962	Invoice	Invoice No: 1011	7/17/2026	Paid Amt: \$660.00
						Check Amount: \$660.00

Check Number: 0-2147483647 Payment Date: 7/1/2026-7/31/2026 Period: 202701-202701 Void Status: N

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type			
SHBC	18980	1067	WH Security, LLC				Check		
			E 01 005 810 000 000 330	Alarm monitoring 500 Maple St		\$45.00			
			PO#:	Voucher #:	14963 Invoice	Invoice No: DT063026	7/17/2026	Paid Amt:	\$45.00
			E 01 005 810 000 000 330	Alarm monitoring 500 Maples St		\$5.95			
			PO#:	Voucher #:	14964 Invoice	Invoice No: DT063026	7/17/2026	Paid Amt:	\$5.95
						Check Amount:		\$50.95	
SHBC	18981	1258	Premier Kitchen, Inc.				Check		
			E 02 005 770 000 701 490	Lunch 11/16/26-11/30		\$1,403.52			
			E 02 005 770 000 705 490	Breakfast 11/16/26-11/30		\$800.00			
			PO#:	Voucher #:	14980 Invoice	Invoice No: 40660	7/17/2026	Paid Amt:	\$2,203.52
									Check Amount:
SHBC	918967	1482	Designs for Learning INC				Check		
			E 01 005 110 000 000 305	HR April		\$183.75			
			PO#:	Voucher #:	14917 Invoice	Invoice No: 26-2115	7/21/2026	Paid Amt:	\$183.75
			E 01 005 110 000 000 305	HR March		\$26.25			
			PO#:	Voucher #:	14916 Invoice	Invoice No: 26-2043	7/21/2026	Paid Amt:	\$26.25
						Check Amount:		\$210.00	
						Report Total:		\$102,937.20	

Period Balance Report

8/18/2026

Period: 202701

11:14 AM

Grp Code	Rcd	Account/Vendor	Voucher No	Type	Invoice No	Inv Date	Balance
4137 B 01 206 000							
1	1711	Canopy IT Solutions	14991	Invoice	13157	07/01/2026	1,705.78
1	1053	City of Monticello	14992	Invoice	0055228	07/10/2026	25,000.00
1	1618	MN PEIP	14993	Invoice	1652407	07/10/2026	7,187.42
1	1661	Nova Education Consultants	14995	Invoice	4767	07/27/2026	1,200.00
1	1078	Osprey Wilds ELC	14996	Invoice	FY27-01	07/22/2026	10,083.94
1	1131	REGION V COMPUTER SERVICES	14997	Invoice	18884	07/01/2026	1,247.75
1	1181	SFM	14998	Invoice	3898189	07/07/2026	6,971.00
1	1606	The Master Teacher	13862	Invoice	116805479	12/10/2024	132.00
1	1606	The Master Teacher	13862	Invoice	116805479	12/10/2024	(132.00)
1	1606	The Master Teacher	13862	Invoice	116805479	12/10/2024	132.00
1	1067	WH Security, LLC	14999	Invoice	15017006019	07/17/2026	90.90
1	1067	WH Security, LLC	15000	Invoice	15017006018	07/17/2026	496.20
1	1275	WM Corporate Services, INC	15001	Invoice	8283768-1593-6	07/01/2026	628.97

Account Total: \$54,743.96

Fund 01 Total: \$54,743.96

Report Total: \$54,743.96

Swan River Montessori # 4137

Receipt Listing Report with Detail by Deposit

Deposit Co	Bank	Batch	Rct No	Receipt Type	Receipt St	Receipt Date	Check No	Pmt Type	Grp Code	Customer	Inv No	Inv Date	Inv Type	Invoice Amount	Applied Amount	Unapplied Amount
3470	4137	SHBC	D0726													
07.15.26	IDEAS			3530	Credit	A	07/15/26	Check	1	MDE						
						4137	R 01 005 000 000 000 211			General Education Aid					86,449.65	0.00
Receipt Total:														\$86,449.65	\$0.00	
Deposit Total:														\$86,449.65	\$0.00	
3471	4137	SHBC	D0726													
07.30.26	IDEAS			3531	Credit	A	07/30/26	Check	1	MDE						
						4137	R 01 005 000 000 000 211			General Education Aid					86,243.52	0.00
Receipt Total:														\$86,243.52	\$0.00	
Deposit Total:														\$86,243.52	\$0.00	
3472	4137	SHBC	D0726													
07.15.26	Thrivent Grant			3532	Credit	A	07/15/26	Check	1	Misc						
						4137	R 01 005 000 000 000 096			Donations					95.00	0.00
Receipt Total:														\$95.00	\$0.00	
Deposit Total:														\$95.00	\$0.00	
3473	4137	SHBC	D0726													
Interest July				3533	Credit	A	07/31/26	Check	1	Misc						
						4137	R 01 005 000 000 000 092			Interest Earnings					670.53	0.00
Receipt Total:														\$670.53	\$0.00	
Deposit Total:														\$670.53	\$0.00	
Report Total:														\$173,458.70	\$0.00	

RUN DATE: 08/12/26
RUN TIME: 12:53

IDEASB41370727

MINNESOTA DEPARTMENT OF EDUCATION
(IDEAS) COMBINED AIDS PAYMENT REPORT

PAYMENT YEAR: 26-27
TEL. (651) 582-8318

DISTRICT: 4137-07 Swan River Montessori Charter Sch

TO: SUPERINTENDENT OF SCHOOLS / COOPERATIVE CENTER DIRECTOR

FR: TRACY GANN-OLEHY Willie L. Jett II
SCHOOL FINANCE COMMISSIONER

RE: AUG 15, 2026 STATE AIDS PAYMENT MAILING

THE FOLLOWING REPORTS ARE INCLUDED ON THE MINNESOTA DEPARTMENT OF EDUCATION WEB SITE AT HTTP://EDUCATION.STATE.MN.US. CLICK ON "DATA CENTER", "DATA REPORTS AND ANALYTICS", AND THEN, UNDER SCHOOL FINANCE REPORTS, CHOOSE "MINNESOTA FUNDING REPORTS (MFR)".

	AID PROGRAM	25-26	26-27
1. 2025-26 FINAL AIDS PAYMENT REPORT, PARTS 1 AND 2 FOR AUGUST 15, WITH OTHER ADJUSTMENT DETAIL REPORT TO SELECTED DISTRICTS	NONPUB PUPIL TRANSPORT	.9999999990	
	DESEG TRANSPORTATION	.9723715361	
	CAREER TECH AID	.9981909500	.8734811400
FINAL PAYMENTS TO 100% OF ENTITLEMENT IS MADE FOR STATE AID TAX CREDITS, LIBRARY BASIC, AND MULTICOUNTY LIBRARY AID PRGMS.	EARLY CHILD & FAM EDUC	.9999901470	
	EQUITY IN TELECOM ACCESS	.6195244427	
	ACHIEVEMENT & INTEGRATIO	.9932648380	
ESTIMATED ANNUAL ENTITLEMENTS HAVE BEEN UPDATED FOR CHARTER SCHOOL LEASE AND ADULTS WITH DISABILITIES AID PROGRAMS.	NONPUBL PUPIL AID	.9829391825	
	ABATEMENT AID FUND 1		.5565331790
	ABATEMENT AID FUND 4		.5565331790
	ABATEMENT AID FUND 7		.5565331790
	ABATEMENT AID FUND 47		.5565331790
2. 2026-27 CURRENT AIDS PAYMENT REPORT, PARTS 1 AND 2 FOR AUGUST 15, WITH OTHER ADJUSTMENT DETAIL REPORT TO SELECTED DISTRICTS AND STATE AIDS PAYMENT SCHEDULE	STUDENT SUPPORT PERSONNL	.9943408170	
	STUDENT SUPPORT COOP	.9943408170	
	STUDENT SUPPORT CHARTER	.9943408170	
	STUDENT SUPPORT MS127A	.9943408170	

ESTIMATED ANNUAL ENTITLEMENTS HAVE BEEN UPDATED FOR CHARTER SCHOOL LEASE AID PROGRAMS.

RUN DATE: 08/12/26 (IDEAS)
RUN TIME: 12:53

MINNESOTA DEPARTMENT OF EDUCATION
STATE AIDS PAYMENT REPORT BY DISTRICT
CURRENT ACCOUNT PART 1

ENTITLEMENT YEAR: 26-27
PAYMENT #03 : AUGUST, 15

DISTRICT: 4137-07 Swan River Montessori Charter Sch

AID PROGRAM	NO. DST	ANNUAL AID ENTITLEMENT	PRORATED AID ENTITLEMENT	GENERAL REDUCTION	ANNUAL UFARS REVENUE	REDUCTION ADJUSTMENT	AMOUNT PAYABLE CURRENT ACCOUNT
GENERAL EDUCATION-CHARTR		0.00	1,505,192.30	0.00	1,505,192.30	0.00	1,354,673.07
SUBTOTAL		0.00	1,505,192.30	0.00	1,505,192.30	0.00	1,354,673.07
SPECIAL ED-CHARTER		819,614.66	819,614.66	0.00	819,614.66	0.00	718,474.21
SUBTOTAL		819,614.66	819,614.66	0.00	819,614.66	0.00	718,474.21
TOTAL		819,614.66	2,324,806.96	0.00	2,324,806.96	0.00	2,073,147.28

RUN DATE: 08/12/26 (IDEAS)
RUN TIME: 12:53

MINNESOTA DEPARTMENT OF EDUCATION
STATE AIDS PAYMENT REPORT BY DISTRICT
CURRENT ACCOUNT PART 2

ENTITLEMENT YEAR: 26-27
PAYMENT #03 : AUGUST, 15

DISTRICT: 4137-07 Swan River Montessori Charter Sch

AID PROGRAM	UFARS CODE	CUMULATIVE AMOUNT DUE	GROSS AID YEAR-TO-DATE	GROSS AID THIS PAYMENT	TAX SHIFT ADJ THIS PAYMENT	OTHER ADJ THIS PAYMENT	NET AID THIS PAYMENT
GENERAL EDUCATION-CHARTR	01S211	259,143.41	172,693.17	86,450.24	0.00	0.00	86,450.24
SUBTOTAL		259,143.41	172,693.17	86,450.24	0.00	0.00	86,450.24
SPECIAL ED-CHARTER	01S360	0.00	0.00	0.00	0.00	0.00	0.00
SUBTOTAL		0.00	0.00	0.00	0.00	0.00	0.00
TOTAL		259,143.41	172,693.17	86,450.24	0.00	0.00	86,450.24

RUN DATE: 08/12/26 (IDEAS)
RUN TIME: 12:53

MINNESOTA DEPARTMENT OF EDUCATION
STATE AIDS PAYMENT SCHEDULE
**** NET AID PAYMENT ****

PAYMENT YEAR: 26-27
BASIS: C0215, F0215

DISTRICT: 4137-07 Swan River Montessori Charter Sch

THIS REPORT CONTAINS SUMMARY INFORMATION ON STATE AID CASH PAYMENTS TO YOUR SCHOOL FOR THE 26-27 PAYMENT YEAR. THE FIRST COLUMN SHOWS THE PAYMENT PERIOD DATE. THE SECOND COLUMN SHOWS THE STATUS - ESTIMATES FOR DATES YET TO COME, CURRENT FOR CURRENT PAYMENT DATE, AND ACTUAL FOR CASH PAYMENTS ACTUALLY TRANSFERRED TO YOUR FINANCIAL INSTITUTION. THE THIRD COLUMN SHOWS PAYMENT AMOUNTS FOR THE 26-27 SCHOOL YEAR (60% OF STATE AID REVENUES). THE FOURTH COLUMN SHOWS FINAL ADJUSTMENT PAYMENT AMOUNTS FOR THE 25-26 SCHOOL YEAR (RECEIVABLE). THE FIFTH COLUMN SHOWS THE SUM OF PAYMENTS FOR THE TWO YEARS ON AN ACTUAL, CURRENT OR ESTIMATED BASIS.

THE CALCULATION OF PAYMENTS TO SCHOOLS IS BASED ON MS 124D.11, SUBD. 9. THE AMOUNTS SHOWN IN PAYMENT PERIODS WITH STATUS OF 'ESTIMATE' ARE BASED ON ENTITLEMENTS ON THE IDEAS SYSTEM AS OF THE CURRENT PAYMENT DATE. ACTUAL CASH PAYMENTS WILL CHANGE FOR SEVERAL REASONS INCLUDING:

1. 26-27 ENTITLEMENT DECREASES RESULT IN REDUCTION OF 26-27 PAYMENT AMOUNTS AS THE SCHOOL HAS RECEIVED MORE CASH THAN IS DUE AT THAT DATE.
2. 26-27 ENTITLEMENT INCREASES RESULT IN AN ADDITIONAL PAYMENT AMOUNT TO 'CATCH UP'.
3. AID ADJUSTMENTS (SEEN IN PART 2 OF THE PAYMENT REPORT IN COLUMN TITLED 'OTHER ADJ THIS PERIOD') ARE AUTHORIZED BY MS 127A.41, SUBD. 2 TO RECOVER AMOUNTS DUE TO THE STATE AS A RESULT OF A) HAVING BEEN PAID MORE THAN 60% AMOUNT PAYABLE CURRENT ACCOUNT FOR 26-27 OR B) HAVING BEEN PAID IN EXCESS OF ANNUAL UFARS REVENUE FOR 25-26.
4. AID ADJUSTMENTS (SEEN IN PART 2 OF THE PAYMENT REPORT IN COLUMN TITLED 'OTHER ADJ THIS PERIOD') DUE TO AUDIT OF PRIOR YEAR STUDENT DATA, PROGRAM OR EXPENDITURE DATA.
5. CHANGES IN THE SCHEDULING OF 25-26 PAYMENT AMOUNTS DUE TO AVAILABILITY OF DATA USED TO CALCULATE STATE AID ENTITLEMENTS.

PAY PERIOD	STATUS	CURRENT YEAR	PRIOR YEAR	TOTAL
JUL 15	ACTUAL	86,449.65	0.00	86,449.65
JUL 30	ACTUAL	86,243.52	0.00	86,243.52
AUG 15	CURRENT	86,450.24	0.00	86,450.24
AUG 30	ESTIMATE	86,450.24	87,500.88	173,951.12
SEP 15	ESTIMATE	86,242.93	0.00	86,242.93
SEP 30	ESTIMATE	86,450.24	92,413.55	178,863.79
OCT 15	ESTIMATE	86,450.24	0.00	86,450.24
OCT 30	ESTIMATE	86,242.93	41,331.62	127,574.55
NOV 15	ESTIMATE	86,450.24	0.00	86,450.24
NOV 30	ESTIMATE	86,450.24	0.00	86,450.24
DEC 15	ESTIMATE	86,242.93	0.00	86,242.93
DEC 30	ESTIMATE	86,450.24	0.00	86,450.24
JAN 15	ESTIMATE	86,450.24	3,229.06	89,679.30
JAN 30	ESTIMATE	86,242.93	3,763.45	90,006.38
FEB 15	ESTIMATE	86,450.24	893.68	87,343.92
FEB 28	ESTIMATE	86,450.24	0.00	86,450.24
MAR 15	ESTIMATE	86,242.93	0.00	86,242.93
MAR 30	ESTIMATE	86,450.24	0.00	86,450.24
APR 15	ESTIMATE	86,450.24	0.00	86,450.24
APR 30	ESTIMATE	86,242.93	23,321.43	109,564.36
MAY 15	ESTIMATE	86,450.24	0.00	86,450.24
MAY 30	ESTIMATE	86,450.24	0.00	86,450.24
JUN 20	ESTIMATE	86,242.93	0.00	86,242.93
JUN 30	ESTIMATE	86,450.24	0.00	86,450.24
TOTAL		2,073,147.28	252,453.67	2,325,600.95

1. 2026-27 AID ENTITLEMENT AMOUNTS ARE BASED ON THE BEST ESTIMATES AVAILABLE AT THIS TIME, BUT MAY BE SOFT.
2. 2025-26 AID ENTITLEMENTS AND PROJECTED FINAL PAYMENTS ARE BASED PRIMARILY ON DATA AS OF THE FEBRUARY 2026 FORECAST AND WILL BE REVISITED THROUGH THE YEAR AS STUDENT, EXPENDITURE AND OTHER DATA ARE FINALIZED.
3. ESTIMATED PAYMENT AMOUNTS ON THIS REPORT REFLECT A 90/10 PAYMENT SCHEDULED. EARLY RECOGNITION ITEMS WITH NO CORRESPONDING AID ADJUSTMENT SPECIFIED IN STATUTE WILL CONTINUE TO BE RECOGNIZED EARLY.

***** INPUTS *****			***** PUPIL COUNTS *****			*** STATE AVERAGE REVENUE PER APU **		
ADJUSTED PUPIL COUNTS			1	2025-26	ADJ ADM ECSE	19	FORMULA ALLOWANCE	7,683.00
			2	2025-26	ADJ ADM VPK	20	CHARTER ADDITIONAL	132.00
1	2025-26	ADJ ADM ECSE	3	2025-26	ADJ ADM FUL-K	21	SPARSITY	37.80
2	2025-26	ADJ ADM VPK	4	2025-26	ADJ ADM HLF-K	22	OPERATING CAPITAL	227.46
3	2025-26	ADJ ADM FUL-K	5	2025-26	ADJ ADM 1-3	23	MNST PRD/OPIATE ANT	2.00
4	2025-26	ADJ ADM HLF-K	6	2025-26	ADJ ADM 4-6	24	GIFTED & TALENTED	13.00
5	2025-26	ADJ ADM 1-3	7	2025-26	ADJ ADM 7-12	25	EQUITY	109.85
6	2025-26	ADJ ADM 4-6						
7	2025-26	ADJ ADM 7-12	8	2025-26	ADJ ADM TOTAL	26	TOTAL (19) TO (25)=	8,205.11

10	2026-27	ADJ ADM ECSE	9	2025-26	ADJ PUPIL UNITS	*** REVENUES BY FUNDING COMPONENT **		
11	2026-27	ADJ ADM VPK		=1.00	* (1)	27	BASIC=(19) * (18)=	1,344,525.00
12	2026-27	ADJ ADM FUL-K		+1.00	* (2)	28	ADDITIONAL=(20) * (18)=	23,100.00
13	2026-27	ADJ ADM HLF-K		+1.00	* (3)	29	SPARSITY=(21) * (18)=	6,615.00
14	2026-27	ADJ ADM 1-3		+0.55	* (4)	30	OPERATING CAPITAL	
15	2026-27	ADJ ADM 4-6		+1.00	* (5)		= [(22) + (23)] * (18) =	40,155.50
16	2026-27	ADJ ADM 7-12		+1.00	* (6)	31	GIFT & TAL=(24) * (18)=	2,275.00
				+1.20	* (7) =	32	EQUITY=(25) * (18)=	19,223.75
***** OTHER DATA *****								
34	SHORT YEAR RATIO	1.00000000	10	2026-27	ADJ ADM ECSE	33	TOTAL (27) TO (32)=	1,435,894.25
42	COMPENSATORY REV	48,014.85	11	2026-27	ADJ ADM VPK	*** DECLINING ENROLLMENT REVENUE ***		
46	2026-27 EL ELIG ADM		12	2026-27	ADJ ADM FUL-K			
49	ADM SERVED FOR EL	166.00	13	2026-27	ADJ ADM HLF-K	34	SHORT YEAR RATIO	
56	LOCAL DISTRICT		14	2026-27	ADJ ADM 1-3		2025-26 APU ARE ADJUSTED	
57	TRANSPORT SPARSITY		15	2026-27	ADJ ADM 4-6		IF SHORT YEAR RATIO < 1.0	
59	DOES SCH TRANSP?	MEMO	16	2026-27	ADJ ADM 7-12			
75	REFERENDUM REV/PU	21.50	17	2026-27	ADJ ADM TOTAL	9	2025-26 APU	170.66
78	ALT COMP ENROLL					18	2026-27 APU	175.00
***** OUTLINE OF REPORT *****			18	2026-27	ADJ PUPIL UNITS			
I.	2026-27 REVENUE			=1.00	* (10)	35	DECLINING PUPIL UNITS	
A.	PUPIL COUNTS	1 - 18		+1.00	* (11)		= GREATER OF ZERO OR	
B.	STATE AVERAGE REV	19 - 26		+1.00	* (12)		= (9) * (34) - (18) =	
C.	REV BY COMPONENT	27 - 33		+0.55	* (13)	36	DECLINING ENROLL ALLOW	
D.	DECLINING	35 - 37		+1.00	* (14)		= 0.28 * (19) =	2,151.24
E.	EXTENDED TIME	38 - 41		+1.00	* (15)	37	DECLINING ENROLL REV	
F.	COMPENSATORY	42 - 45		+1.20	* (16) =		= (35) * (36) =	
G.	ENGLISH LEARNER	46 - 54				***** EXTENDED TIME REVENUE *****		
H.	EL CROSS SUBSIDY	55				38	DOES SCHL HAVE PRG?	NO
I.	TRANSP SPARSITY	56 - 58				18	2026-27 APU	175.00
J.	TRANSPORTATION	59 - 64				39	AVE DIST EXT REV	51.34
K.	PENSION ADJUST	65 - 72				40	EXTENDED TIME ALLOW	
L.	TRANSITION	73 - 74					= IF (38) = YES	
M.	REFERENDUM & LOR	75 - 76					THEN (39) * 25%	
N.	GENED ENTITLEMENT	77					ELSE (40) = 0	
O.	ALTERNATIVE COMP	78 - 82				41	EXTENDED TIME REVENUE	
P.	ENDOWMENT	83 - 85					= (18) * (40) =	
II.	REVENUE RESTRICTIONS	86 - 94						
III.	REVENUE FOR SPEC ED	95 - 98						

***** COMPENSATORY REVENUE *****		***** TRANSPORTATION SPARSITY *****		***** PENSION ADJUST REV CONT *****		
42	COMPENSATORY REV (SEE COMPENSATORY REPORT FY 2027)	48,014.85	56 LOCAL DISTRICT 57 TRANSPORT SPARSITY ALLOW (INCLUDES PUPIL TRANSPORTATION ADJUSTMENT IN RESIDENT DISTRICT)	71	PRORATED PENSION ADJUST = (69) * (70) =	18,033.45
43	COMPENSATORY REV NEW VPK SITES		58 TRANSPORTATION SPARSITY REVENUE = (57) * (18) =	72	TOTAL PENSION ADJ REV = (66) + (71) =	18,033.45
44	ONE-TIME COMPENSATORY ADJUSTMENT (SEE HOLD HARMLESS SPREADSHEET ON WEBSITE)		***** TRANSPORTATION REVENUE *****	***** TRANSITION REVENUE *****		
45	TOTAL COMPENSATORY = (42) + (43) + (44)=	48,014.85	59 DOES SCH TRANSP? 60 BASIC TRANSPORTATION ALLOW=(19) * 0.0466 =	74	TRANSITION REVENUE = (73) * (18) =	
***** ENGLISH LEARNER REVENUE *****			358.03	** REFERENDUM & 1ST TIER LOR REV **		
46	2026-27 EL ELIG ADM		61 TRANSP SPAR ALLOW (INCLUDES PUPIL TRANSPORTATION ADJUSTMENT IN RESIDENT DISTRICT)	75	REFERENDUM & 1ST TIER LOR REV PER PUPIL UNIT	21.50
47	EL PUPILS IF(46)=0 THEN ZERO; ELSE GTR OF 20 OR (46)		62 TOTAL TRANSPORT ALLOW = (57) + (60) =	76	REFERENDUM & 1ST TIER LOR REVENUE = (75) * (18) =	3,762.50
48	EL REVENUE = (47) * \$1,775 =		63 TRANSPORTATION REVENUE = (18)*(62) =	** GENERAL EDUCATION ENTITLEMENTS **		
***** EL CONCENTRATION REVENUE *****			62,655.25	77	ANNUAL IDEAS ENTITLEMENT = (33)+(37)+(41)+(45) + (54)+(55)+(58)+(64) + (72)+(74)+(76) =	1,505,705.05
49	2026-27 ADM SERVED	166.00	64 TRANSPORT ADJUSTMENT IF (59) = YES, (64) = ZERO ELSE (64) = (63) * -1	***** ALTERNATIVE COMP REVENUE *****		
50	CONCENTRATION PORTION=(46) / (49) =		**** PENSION ADJUSTMENT REVENUE ****	78	ALTERNATIVE COMP ENROLLMENT (SEE Q COMP ENROLLMENT FY 2027 REPORT)	
51	CONCENTRATION FACTOR = LSR OF 1 OR (50) /.115 =		65 INITIAL PENSION ALLOW	79	ALTERNATIVE COMP ALLOWANCE (EST)	257.99
52	EL PUPIL UNITS = (46) * (51) =		66 INITIAL PENSION REVENUE = (65) * (18) =	80	ALT COMP REVENUE = (78) * (79) =	
53	EL CONCENTRATION REVENUE= (52) * \$630		TWO YEARS PRIOR SALARIES ARE USED UNTIL LAST YEAR SALARIES ARE AVAILABLE	81	IDEAS PRORATION FTR	1.00000000
54	TOTAL EL REVENUE = (48) + (53) =		67 MEMBER SALARIES (FY25 SALARIES)	82	PRORATED ALT COMP AID ENTITLEMENT = (80) * (81) =	
CODE TO 01-005-219-339-211-000			780,668.92			
***** EL CROSS-SUBSIDY REVENUE *****			68 PENSION ADJUST RATE			
			.0231			
55	EL CROSS-SUBSIDY REVENUE (SEE SPREADSHEET ON WEBSITE)		69 PENSION ADJUST = (67) * (68) =			
CODE TO 01-005-219-000-211-000			18,033.45			
			70 FY 2027 PENSION PRORATION FACTOR			
			1.00000000			

***** SCH LAND TRUST ENDOWMENT *****

83 SEP 2026 ENDOW (EST) 6,412.19
 84 MAR 2027 ENDOW (EST) 6,412.19

85 FULL YEAR ENDOWMENT
 = (84) + (83) = 12,824.38

***** REVENUE RESTRICTIONS *****

(RECOMMENDED BUT NOT REQUIRED
 FOR CHARTER SCHOOLS)

LEARNING & DEVELOPMENT RESTRICTION

3 2025-26 ADJ ADM FUL-K 34.99
 4 2025-26 ADJ ADM HLF-K
 5 2025-26 ADJ ADM 1-3 78.95
 6 2025-26 ADJ ADM 4-6 56.72

86 RESTRICTION PER KGN 299.00
 87 RESTRICTION PER 1-3 459.00
 88 RESTRICTION PER 4-6 459.00

89 RESTRICTION REG KGN
 =[(3)+(4)]*(86)]= 10,462.01

90 RESTRICTION GRADES 1-3
 =(5) * (87)= 36,238.05

91 RESTRICTION GRADES 4-6
 =(6) * (88)= 26,034.48

92 LDR RESTRICTION TOTAL
 =(89) + (90) + (91)= 72,734.54

OTHER RESTRICTIONS

45 COMPENSATORY REV 48,014.85
 54 ENGLISH LEARNER REV
 30 OPERATING CAPITAL 40,155.50
 31 GIFTED & TALENTED 2,275.00
 80 ALTERNATIVE COMP
 93 STAFF DEVELOPMENT
 =(19) * (18) * .02= 26,890.50

94 TOTAL RECOMMENDED RESTRICTIONS
 =(92) + (45) + (54)
 + (30) + (31)
 + (80) + (93)= 190,070.39

THE AID SHOWN ON THIS REPORT WILL BE PAID THROUGH
 MDE'S IDEAS SYSTEM. QUESTIONS REGARDING
 GENERAL EDUCATION REVENUES SHOULD BE DIRECTED TO
 BECKY WOCHNICK AT BECKY.WOCHNICK@STATE.MN.US
 OR KRISTINE ANDERSON AT KRISTINE.ANDERSON@STATE.MN.US

***** REVENUE FOR SPECIAL ED *****

GENERAL EDUC REVENUE FOR SPECIAL
 EDUC EXCESS COST AID UNDER
 M.S. 125A.79

95 GENERAL EDUC REVENUE
 EXCLUDES REFERENDUM,
 OPERATING CAPITAL
 AND TRANS SPARSITY 1,461,787.05

GENERAL EDUC REV PER PUPIL
 UNIT FOR SPECIAL EDUC TUITION
 BILLING UNDER M.S. 125A.11
 AND CROSS SUBSIDY TUITION
 BILLING UNDER M.S. 127A.51.

96 GENERAL EDUC REVENUE PER APU
 EXCLUDING SPARSITY,
 COMPENSATORY, EL
 =[(77)-(29)-(45)-(54)]
 / (18) 8,291.86

97 ENGLISH LEARNER
 PER APU
 =(54) / (18)=

98 SPARSITY PER APU
 =(29) / (18)= 37.80

**** GENERAL ED REVENUE SUMMARY ****

27 BASIC 1,344,525.00
 28 CHARTER ADDITIONAL 23,100.00
 29 SPARSITY 6,615.00
 30 OPERATING CAPITAL 40,155.50
 31 GIFTED & TALENTED 2,275.00
 32 EQUITY 19,223.75

37 DECLINING ENROLL REV
 41 EXTENDED TIME REV
 45 COMPENSATORY 48,014.85

54 ENGLISH LEARNER
 55 EL CROSS SUBSIDY
 58 TRANSPORT SPARSITY
 64 TRANSPORT ADJUST

72 PENSION ADJ REV 18,033.45
 74 TRANSITION REVENUE
 76 REFERENDUM & 1ST TIER
 LOR REVENUE 3,762.50

77 ANNUAL IDEAS ENTITLEM 1,505,705.05

***** NON-GENERAL ED REVENUE *****

82 PRORATED ALT COMP
 85 FULL YR ENDOWMENT 12,824.38

99 NON-GENED REV TOTAL 12,824.38

*** GENED REVENUE BY ADJUSTED PU ***

27 BASIC 7,683.00
 28 CHARTER ADDITIONAL 132.00
 29 SPARSITY 37.80
 30 OPERATING CAPITAL 229.46
 31 GIFTED & TALENTED 13.00
 32 EQUITY 109.85

37 DECLINING ENROLL REV
 41 EXTENDED TIME REV
 45 COMPENSATORY 274.37

54 ENGLISH LEARNER
 55 EL CROSS SUBSIDY
 58 TRANSPORT SPARSITY

64 TRANSPORT ADJUST
 72 PENSION ADJ REV 103.05
 74 TRANSITION REVENUE

76 REFERENDUM & 1ST TIER
 LOR REVENUE 21.50

77 ANNUAL IDEAS ENTITLEM 8,604.03

* NON-GENED REVENUE BY ADJUSTED PU *

82 PRORATED ALT COMP
 85 FULL YR ENDOWMENT 73.28

99 NON-GENED REV TOTAL 73.28

RUN DATE 08/13/26
DISTRICT 4137-07
Swan River Montessori Charter Sch

MINNESOTA DEPARTMENT OF EDUCATION
COMPENSATORY REVENUE FY 2027

PAGE 1
ALLOWANCE 7,317.40

GENEDD41370727

		A	B	C	D	E	F	G
		OCT 1, 2025 FALL ENROLL	2025 FREE LUNCH COUNT	2025 REDUCED LUNCH COUNT	B+ (.5xC) COMPENSATORY PUPILS	D/A BUILDING CONCENTRATION FACTOR	Ex7317 COMPENSATORY BUILDING ALLOWANCE	DxF REVENUE
DISTRICT SITE	DISTRICT/SITE NAME							
DISTRICT SITES								
4137-07	Swan River Montessori Charter Sch							
010	Swan River Montessori Charter Sch	161	20	25	32.50	0.2019	1,477.38	48,014.85
DISTRICT TOTAL		161	20	25	32.50			48,014.85

The totals on this report do not include the FY27 hold harmless amount. See the FY27 Compensatory Revenue Hold Harmless spreadsheet on the MDE Funding Projections and Trends website for the hold harmless and total compensatory revenue calculation. Enrollment and free/reduced lunch counts determined to be eligible by means of direct certification are collected as of October 1 of each year. Counts are used for compensatory revenue in the succeeding fiscal year. The Compensatory allowance is adjusted to proportionately reach the statewide minimum compensatory revenue set under MS126C.10 subd. 3(f). Questions about this report should be directed to Kristine Anderson, School Finance at 651-582-8544.

SWAN RIVER MONTESSORI CHARTER SCHOOL EMPLOYEE HANDBOOK

Adopted by Board of Directors August 2026

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SECTION 1: The Way We Work

Welcome to Swan River Montessori Charter School!

Starting a new job is exciting, but at times can be overwhelming. This Employee Handbook has been developed to help you become acquainted with our school and answer many of your initial questions.

As an employee of Swan River Montessori Charter School, the importance of your contribution cannot be overstated. Our goal is to provide the finest-quality services to our families and to do this more efficiently and economically than our competitors. By satisfying our families' needs, they will continue to use our services and will recommend us to others.

You are an important part of this process for your work directly influences our school's reputation. We are glad you have joined us, and we hope you will find your work to be both challenging and rewarding.

***Note: This Employee Handbook should not be considered an employee/employer agreement or contract.*

Building for the Future

At all times, you represent the school, and it is up to each employee to take this responsibility seriously. Our school exists with your joint efforts. Do not underestimate your contribution to it. A great many people outside the school who invest their time, money, and faith in us are part of that equation. They are our families who will determine how fast we grow, how many people we will employ, and how much service we render. To retain these families, we want to ensure that our good service continues by always giving the best possible value and quality. Working together and working well provides us with a bright future and with the most important commodity, a good reputation.

A Word about This Handbook

This Employee Handbook contains information about the employment policies and practices of the school. We expect each employee to read this Employee Handbook carefully, as it is a valuable reference for understanding your job and the school. The policies outlined in this Employee Handbook should be regarded as management guidelines only, which in a developing business will require changes from time to time. The school retains the right to make decisions involving employment as needed to conduct its work in a manner that is beneficial to the employees and the school. This Employee Handbook supersedes and replaces any and all prior Employee Handbooks and inconsistent verbal or written policy statements. Except for the policy of at-will employment, which can only be changed by Board of Directors of the school in writing, the school reserves the right to revise, delete and add to the provisions of this Employee Handbook. All such revisions, deletions or additions must be in writing

and must be signed by the Director of the school. No oral statements or representations can change the provisions of this Employee Handbook.

The provisions of this Employee Handbook are not intended to create contractual obligations with respect to any matters it covers. Nor is this Employee Handbook intended to create a contract guaranteeing that you will be employed for any specific period of time.

Section 2: At Will Employment

Employment at Swan River is on an at-will basis. This means that either the employee or the company may terminate the employment relationship at any time, for any reason, with or without notice.

Nothing in this employee handbook creates or is intended to create an employment agreement, express or implied. Nothing contained in this, or any other document provided to the employee is intended to be, nor should it be, construed as a contract that employment or any benefit will be continued for any period of time. In addition, no company representative is authorized to modify this policy for any employee or to enter into any agreement, oral or written, that changes the at-will relationship.

Any salary figures provided to an employee in annual or monthly terms are stated for the sake of convenience or to facilitate comparisons and are not intended to and do not create an employment contract for any specific period of time.

Nothing in this statement is intended to interfere with, restrain, or prevent concerted activity as protected by the National Labor Relations Act (NLRA). Such activity includes employee communications regarding wages, hours, or other terms or conditions of employment. Swan River employees have the right to engage in or refrain from such activities.

Section 3: Equal Opportunity and Commitment to Diversity

Equal Employment Opportunity

Swan River provides equal employment opportunities to all employees and applicants for employment without regard to race, hair features, based on race, color, creed, ancestry, national origin, citizenship, sex or gender (including pregnancy, childbirth, and pregnancy-related conditions), gender identity or expression (including transgender status), sexual orientation, marital status, religion, age, disability, genetic information, service in the military, public assistance, familial status, local human rights commission activity, or any other characteristic protected by applicable federal, state, or local laws and ordinances. Equal employment opportunity applies to all terms and conditions of employment, including hiring, placement, promotion, termination, layoff, recall, transfer, leave of absence, compensation, and training.

Swan River expressly prohibits any form of unlawful employee harassment or discrimination based on any of the characteristics mentioned above. Improper interference with the ability of other employees to perform their expected job duties is absolutely not tolerated.

Swan River will endeavor to make a reasonable accommodation of an otherwise qualified applicant or employee related to an individual's physical or mental disability, sincerely held religious beliefs and practices, and/or any other reason required by applicable law, unless doing so would impose an undue hardship upon **Swan River's** business operations.

Any employees with questions or concerns about equal employment opportunities in the workplace are encouraged to bring these issues to the attention of the **School Director**. The company will not allow any form of retaliation against individuals who raise issues of equal employment opportunity. Employees who feel they have been subjected to any such retaliation should bring it to the attention of the HR manager.

Retaliation means adverse conduct taken because an individual reported an actual or a perceived violation of this policy, opposed practices prohibited by this policy, or participated in the reporting and investigation process described below. "Adverse conduct" includes but is not limited to:

- (1) Shunning and avoiding an individual who reports harassment, discrimination, or retaliation;
- (2) Express or implied threats or intimidation intended to prevent an individual from reporting harassment, discrimination, or retaliation; or
- (3) Denying employment benefits because an applicant or employee reported harassment, discrimination, or retaliation or participated in the reporting and investigation process.

Other examples of retaliation include firing, demotion, denial of promotion, unjustified negative evaluations, increased surveillance, harassment, and assault.

Complaints of discrimination should be filed according to the procedures described in the Harassment and Complaint Procedure.

Americans with Disabilities Act

Swan River is committed to the fair and equal employment of individuals with disabilities under the ADA. It is Swan River's policy to provide reasonable accommodation to qualified individuals with disabilities unless the accommodation imposes an undue hardship on the company. Swan River prohibits any harassment of, or discriminatory treatment of, employees or applicants based on a disability or because an employee has requested reasonable accommodation.

In accordance with the ADA, reasonable accommodations will be provided to qualified individuals with disabilities to enable them to perform the essential functions of their jobs or to enjoy the equal benefits and privileges of employment. An employee or applicant with a disability may request an accommodation from the HR department and should specify what accommodation is needed to perform the job and submit supporting documentation explaining the basis for the requested accommodation, to the extent permitted and in accordance with applicable law. The company then will review and analyze the request, including engaging in an interactive process with the employee or applicant, to identify if such an accommodation can be made, or if any other possible accommodation is appropriate. If requested, the employee is responsible for providing medical documentation regarding the disability and possible accommodation. All information obtained concerning the medical condition or history of an

applicant or employee will be treated as confidential information, maintained in separate medical files, and disclosed only as permitted by law.

It is the policy of Swan River to prohibit harassment or discrimination based on disability or because an employee has requested reasonable accommodation. Swan River prohibits retaliation against employees for exercising their rights under the ADA or other applicable civil rights laws. Employees should use the procedures described in the Harassment and Complaint Procedure to report any harassment, discrimination, or retaliation they have experienced or witnessed.

Commitment to Diversity

Swan River is committed to creating and maintaining a workplace in which all employees have an opportunity to participate and contribute to the success of the business and are valued for their skills, experience, and unique perspectives. This commitment is embodied in company policy and the way we do business at Swan River and is an important principle of sound school management.

Harassment and Complaint Procedure

It is Swan River's policy to prohibit intentional and unintentional harassment **and Malicious or Sadistic conduct (see Separate Policy in this Handbook for complete description)** of or against job applicants, contractors, interns, volunteers, or employees by another employee, supervisor, vendor, customer, or third party based on actual or perceived race, color, creed, religion, national origin, ancestry, citizenship status, age, sex or gender (including pregnancy, childbirth, and pregnancy-related conditions), gender identity or expression (including transgender status), sexual orientation, marital status, military service and veteran status, physical or mental disability, genetic information, hair features based on race, or any other characteristic protected by applicable federal, state, or local laws. Such conduct will not be tolerated by Swan River.

Furthermore, any retaliation against an individual who has complained about sexual or other harassment or retaliation against individuals for cooperating with an investigation of a harassment complaint is similarly unlawful and will not be tolerated. Swan River will take all reasonable steps necessary to prevent and eliminate unlawful harassment.

Definition of "unlawful harassment." "Unlawful harassment" is conduct that has the purpose or effect of creating an intimidating, a hostile, or an offensive work environment; has the purpose or effect of substantially and unreasonably interfering with an individual's work performance; or otherwise adversely affects an individual's employment opportunities because of the individual's membership in a protected class.

Unlawful harassment includes, but is not limited to, epithets; slurs; jokes; pranks; innuendo; comments; written or graphic material; stereotyping; or other threatening, hostile, or intimidating acts based on race, color, ancestry, national origin, gender, sex, sexual orientation, marital status, religion, age, disability, veteran status, or another characteristic protected by state or federal law.

Definition of "sexual harassment." While all forms of harassment are prohibited, special attention should be paid to sexual harassment. "Sexual harassment" can include all of the above actions, as well as other unwelcome conduct, and is generally defined under both state and federal law as unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature whereby:

- Submission to or rejection of such conduct is made either explicitly or implicitly as a term or condition of any individual's employment or as a basis for employment decisions.

- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, or an offensive work environment.

Other sexually oriented conduct, whether intended or not, that is unwelcome and has the effect of creating a work environment that is hostile, offensive, intimidating, or humiliating to workers may also constitute sexual harassment.

While it is not possible to list all those additional circumstances that may constitute sexual harassment, the following are some examples of conduct that, if unwelcome, may constitute sexual harassment depending on the totality of the circumstances, including the severity of the conduct and its pervasiveness:

- Unwanted sexual advances, whether they involve physical touching or not;
- Sexual epithets; jokes; written or oral references to sexual conduct; gossip regarding one's sex life; comments about an individual's body; and comments about an individual's sexual activity, deficiencies, or prowess;
- Displaying sexually suggestive objects, pictures, or cartoons;
- Unwelcome leering, whistling, brushing up against the body, sexual gestures, or suggestive or insulting comments;
- Inquiries into one's sexual experiences; and
- Discussion of one's sexual activities.

All employees should take special note that, as stated above, retaliation against an individual who has complained about sexual or other harassment and retaliation against individuals for cooperating with an investigation of sexual or other harassment complaints violate Swan River's policy.

Complaint procedure. If an employee believes they have been subject to or have witnessed unlawful discrimination, including sexual or other forms of unlawful harassment, or other inappropriate conduct, they are requested and encouraged to make a complaint. They may complain directly to the Director. Similarly, if employees observe acts of discrimination toward or harassment of another employee, they are requested and encouraged to report this immediately. In addition, if the complaint is against the School Director, please contact the School Board Chair.

All complaints will be investigated promptly, and confidentiality will be protected to the extent possible. A timely resolution of each complaint should be reached and communicated to the parties involved.

If the investigation confirms conduct that violates this policy has occurred, **Swan River** will take immediate, appropriate, corrective action, including discipline, up to and including immediate termination.

No reprisal, retaliation, or other adverse action will be taken against an employee for making a complaint or report of discrimination or harassment or for assisting in the investigation of any such complaint or report. Any suspected retaliation or intimidation should be reported immediately to one of the persons identified above.

Section 4: Employment Relationship

Employment Classification

INTRODUCTORY PERIOD: Full-time and part-time employees are on an introductory period during their first 30 days of employment.

During this time, you will be able to determine if your new job is suitable for you and your supervisor will have an opportunity to evaluate your work performance. However, the completion of the introductory period does not guarantee employment for any period of time thereafter.

- **FULL-TIME EMPLOYEES** regularly work at least a 30-hour workweek.
- **PART-TIME EMPLOYEES** work less than 30 hours each week.
- **PER DIEM EMPLOYEES** do not work regularly scheduled hours but are called in to work on an as-needed basis.

In addition to the preceding, employees are also categorized as "exempt" or "non-exempt."

- **NON-EXEMPT EMPLOYEES** are entitled to overtime pay as required by applicable federal and state law.
- **EXEMPT EMPLOYEES** - Pursuant to applicable federal and state laws, exempt employees are not entitled to overtime pay, and are not subject to certain deductions to their weekly salary under the school's policies.

Upon hire, your supervisor will notify you of your employment classification(s).

Criminal History Background Checks

In accordance with Minnesota Statutes §123B.03, Subd. 1(e), Swan River Montessori Charter School notifies parents and guardians that the school requires criminal history background checks on employees and on other individuals who provide services to the school.

Positions subject to criminal history background checks include, but are not limited to:

- Licensed teachers
- Classroom assistants and paraprofessionals
- Administrative and office staff
- Extended care staff
- Substitute teachers
- Volunteers and field trip chaperones
- Contractors, consultants, and service providers who may have direct contact with students
- Coaches, activity leaders, and other individuals supervising students

The School Director or other authorized hiring authority retains discretion, consistent with Minnesota law, to determine:

- Which positions and service roles are subject to a criminal history background check; and
- The extent, scope, and timing of such background checks based on the individual's access to students, level of supervision, and responsibilities within the school environment.

All background checks will be conducted in accordance with applicable Minnesota law and school policy. Employment, volunteer participation, or service with the school may be contingent upon the results of such background checks.

Meal and Rest Breaks

Employees are entitled to a 30-minute paid meal break each day. Employees are also entitled to two 15-minute rest periods each day. Meal and rest breaks **may** be scheduled by the department supervisor or manager, **or you may work the break into your day.**

Deductions from Pay

The school is required by law to make certain deductions from your paycheck each pay period. Such deductions typically include federal and state taxes, Social Security (FICA) taxes, teacher's retirement account (TRA) deductions, public employees' retirement account (PERA) deductions, and possible additional voluntary deductions. All deductions and the amount of the deductions are listed on your pay stub. These deductions are totaled each year for you on your Form W-2, Wage and Tax Statement.

Permitted deductions. The FLSA limits the types of deductions that may be made from the pay of an exempt employee. Deductions that are permitted include:

- Deductions that are required by law, e.g., income taxes;
- Deductions for employee benefits when authorized by the employee;
- Absence from work for one or more full days for personal reasons other than sickness or disability;
- Absence from work for one or more full days due to sickness or disability if the deduction is made in accordance with a bona fide plan, policy, or practice of providing compensation for salary lost due to illness;
- Absences of one or more full days after replacement compensation has been exhausted;
- Offset for amounts received as witness or jury fees or for military pay;
- Unpaid disciplinary suspensions of 1 or more full days imposed in good faith for workplace conduct rule infractions;
 - violations of safety rules of major significance
 - Suspensions of one or more full days for violations of workplace conduct rules, such as rules against sexual harassment and workplace violence
- Any full workweek in which the employee does not perform any work;
- Payment of actual time worked in the first and last weeks of employment;
- Any unpaid leave taken under the Family and Medical Leave Act, MN Paid Family Medical Leave (PFML);
- Negative paid-time-off balances, in whole-day increments only.

Improper deductions. **Employees are strongly encouraged to review their pay stubs regularly, errors may happen occasionally.** If an employee believes that an improper deduction has been taken from the employee's pay, the employee should immediately report the deduction to the Director. The report will be promptly investigated, and if it is found that an improper deduction has been made, the company will reimburse the employee for the improper deduction. **Please be aware that small minor administrative adjustments may be made to pay by the payroll department as needed.**

If questions or concerns about any pay deductions arise, employees may discuss and resolve them with the School Director.

Anniversary Date

The first day you report to work will be recorded in school records as your anniversary date. This date may be used to calculate many different school benefits. If you have any questions regarding your anniversary date, please see your supervisor.

Certification, Licensing and Other Requirements

Licensed staff are required to maintain their license in good standing. Please work with your supervisor if there are any licensing, certifications, or testing requirements for your job that need to be scheduled during a work day. Failure to qualify or to maintain a certification or license may be sufficient cause for termination. If you have questions about licensing, please contact our licensing committee..

Professional License

Each employee hired as a teacher is responsible for maintaining his or her license in good standing. The school requires a current copy of each teacher's license as part of the teacher's file. The school may offer certain continuing education units, including conferences, which may be utilized to obtain some of the continuing education units required for re-licensure in Minnesota. The school does not guarantee any number of hours and it is each teacher's responsibility to obtain his or her continuing education units at the teacher's expense and during the teacher's own time. Personal days may be utilized to obtain continuing education credits.

Grievance and Complaint Procedure

To report a violation of the policies outlined above, including sexual harassment, employees are encouraged to file a timely complaint to enable prompt investigation and correction of any behavior that may be in violation of these policies. Except as noted in this guideline, an employee may grieve any action which the employee believes adversely affects the employee's working conditions.

Grievance and/or complaint procedures shall be in accord with the following guidelines:

Level 1: Whenever possible, the employee shall meet with your direct supervisor to attempt to resolve the issue informally. The School Board is not is not where you go to initially address questions and concerns.

Level 2: If the employee is unsatisfied with the resolution determined at Level 1, or is uncomfortable discussing the complaint with the identified individuals, the employee may file a written complaint to the Executive Director, School Board Chair, or Human Resources Consultant of Swan River Montessori within ten days of receipt of the Level 1 written decision. They shall review the grievance and issue a final written decision. Upon completion of the investigation, the Director will issue a written decision to determine and implement appropriate action. If, after investigation, Swan River Montessori determines that an employee's behavior is in violation of this policy, appropriate disciplinary action will be taken up to and including termination of employment. Grievances and/or complaints will be kept as confidential as practicable.

The Executive Director or Human Resources Consultant may employ any additional procedures as needed to implement this policy.

Recording Your Time

All employees subject to this policy are required to accurately record and submit all time worked.

Non-exempt employees must record their hours on a timesheet &/or through an online Time Tracker and submit time to the Operational Coordinator and/or the School Director upon request. Failure to submit timesheets when on time and accurately may result in disciplinary action. In addition, employees are not allowed to alter their own or another employee's timesheet.

Exempt employees may be required to accurately record and report time off or time for "special" days (ie. PTO, etc.) in accordance with federal and state wage and hour law.

For payroll purposes, the workweek starts on Monday at midnight and ends on Sunday at 11:59 pm.

Payday

You will be paid semimonthly on the 5th of the month and the 20th of the month for the periods which have ended on the last day of prior month and the 15th of the each month.

When our payday is a holiday, you normally will be paid on the last working day before the holiday. If our payday is a Saturday or Sunday, you normally will be paid on Friday.

Please review your paycheck for errors. If you find a mistake, report it to the manager immediately. The manager will assist you in taking the steps necessary to correct the error.

Pay Advances

Pay advances will not be granted to employees.

Overtime

There will be times when employees will need to work overtime so that we may meet the needs of our families. Although you will be given advance notice when feasible, this is not always possible. Exempt/Salaried employees are not paid overtime but are required to work until the job is done. Non-exempt employees must have all overtime approved in advance by the School Director.

Non-exempt employees will be paid at a rate of time and one-half their regular hourly rate for hours worked more than 40 hours in a workweek unless state law provides otherwise. Only actual hours worked count toward computing weekly overtime. PTO does not count toward overtime.

If you have any questions concerning overtime pay, check with the School Director.

Reporting Time Pay

The school will make every effort to notify employees in advance when it is not necessary to report to work. These circumstances may include inclement weather, fire, flood, power outage, lack of work, etc. In the event you report for work without being notified in advance that your services are not needed, you will be compensated in accordance with applicable state and federal wage and hour laws.

Garnishment/Child Support

When an employee's wages are garnished by a court order, our school is legally bound to withhold the amount indicated in the garnishment order from the employee's paycheck. Our school will, however, honor federal and state guidelines which protect a certain amount of an employee's income from being subject to garnishment.

Direct Deposit

You have the option of receiving your pay in a payroll check or having your pay deposited into your bank account through our direct deposit program.

Performance Reviews

Your performance is important to our school. Once each year, the school director will review your job progress within our school and help you to set new job performance plans.

Teachers

Once each year, generally at the end of the academic year, the school director will review your job progress within our school and help you to set new job performance plans. **Classroom observations are conducted regularly and goals for teachers are set in the fall.**

Classroom Assistants and Paraprofessionals and Interns

Once each year, generally at the end of the academic year, the school director will review your job progress within our school and help you to set new job performance plans.

Our performance review program provides the basis for better understanding between you and the school director, with respect to your job performance, potential and development within the school.

New employees will generally be reviewed at the end of their introductory period and again toward the end of the academic year.

Job Descriptions

The school maintains a job description for each position in the school. The job description outlines the essential duties and responsibilities of the position. When the duties and/or responsibilities of a position change, the job description is revised to reflect those changes. If you have any questions or wish to obtain a copy of your position's job description, please see your supervisor.

Job Postings

Job openings may be posted in-house and announced verbally. If you are interested in applying for one of these positions, notify the School Director and speak to the person indicated on the notice.

Section 5: Time Off and Leaves of Absence

Holidays

Our school normally observes the following holidays during the year:

New Year's Day
President's Day
Memorial Day
Labor Day
Thanksgiving Day
The Day after Thanksgiving
Christmas

If one of the above holidays falls on Saturday, it normally is observed on the preceding Friday. If one falls on Sunday, it normally is observed on the following Monday.

All hourly employees, regardless of full- or part-time status, receive holiday pay equal to the number of hours the employee would otherwise work if the day was not a holiday. Employees are eligible for paid holidays immediately upon hire. Non-exempt employees must work their scheduled workday before and after the holiday to be paid for the holiday unless they are absent with **scheduled/planned** prior permission from the School Director.

Exempt/Salaried employees are not paid additional for the holiday.

Paid Time Off (PTO)

Paid Time Off (PTO) hours are calculated and distributed as of the new academic school **year upon return for the new year.** **This policy complies with Minnesota's state-wide Emergency Safe and Sick Time law.**

Hours Worked Per Week:	Hours/Days of Paid Time Off Per Year:
40	80 Hours = 10 Days
35-39	70 Hours = 8.75 Days
30-34	60 Hours = 7.5 Days
25-29	50 Hours = 6.25 Days
20-24	40 Hours = 5 Days
15-19	30 Hours = 3.75 Days
Below 15	1 hour earned for every 30 hours worked (to comply with safe and sick time)

- Paid-time PTO is distributed annually.
- PTO is allowed to be used/deducted on an 1 hour basis for all employees.
- PTO time under this policy will be automatically applied to any time off from work that you may take.
- If you are absent from work for a reason that is covered by ESST and you do not want PTO to be used for the absence, you must promptly submit a written request stating that PTO should not be applied.
- Absences for which PTO is not used may be subject to discipline, even if the absence is for an ESST-covered reason.

PTO hours may be used as vacation time, sick time or as personal days. If you do not use your PTO hours during the school year (defined as any day between the first day of school and the last day of school annually), you may carry up to 40 PTO hours into the following school year. PTO may not be used during the summer months (defined as any day after the last day of school and the first day of school of the following year) unless the employee is contracted to work for SRMCS during that time (e.g., a summer program employee, office staff, etc.). Employees are not paid for unused PTO hours.

Planned requests for planned PTO must be given to the School Director at least 14 days in advance for approval. (PFML requires 30 days advance notice.).

Note: Attendance during the first and last 2 weeks of the school year is mandatory, except for an emergency or an urgent **ESST Qualifying event**. In that case, the employee must seek specific approval for time off as well as keep in regular contact with the School Director regarding daily attendance.

Note: SRMCS understands that employees have families that may have special events at the end of the school year. Therefore, an employee may request no more than one PTO during this two-week timeframe (unless the reason falls under Safe and Sick time). Approval of this day is at the discretion of the School Director.

Employees who use all PTO hours prior to the end of the school year ending may still request time off unpaid, but these requests must be given to the School Director for approval. Unpaid time off from work due to the full consumption of PTO will be monitored very closely, **will be capped at 5 days, and may lead to disciplinary action by the School Director should it be considered excessive, or not be covered by a qualifying leave of absence. Any employee granted unpaid days off over and above regular PTO must receive specific written** approval for additional time off as well as keep in regular contact with the School Director regarding daily attendance.

State and local laws also provide earned sick and safe time, which allows PTO to be provided to an associate for the following reasons:

- An absence resulting from an employee's own mental or physical illness, injury, or health condition; to accommodate the employee's need for medical diagnosis, care, or treatment of a mental or physical illness, injury, or health condition; or an employee's need for preventive medical care;
- To allow the employee to provide care for a family member with a mental or physical illness, injury, or health condition; care for a family member who needs medical diagnosis, care, or treatment of a mental or physical illness, injury, or health condition; or care for a family member who needs preventive medical care.
 - *Family member is defined as including children (adopted, adult, foster and step-children, child-in-law), parents, parents-in-law, step-parents, foster parent, spouses, registered domestic partners, grandchildren, foster grandchildren, step-grandchild, grandparents, step-grandparent, siblings, step-sibling, sibling in-law, wards, niece, nephew, a sibling of the parents of an employee, any*

child to whom the employee stand(s) in place of a parent, any parent who stood in place of a parent for the employee, other individuals related by blood or affinity, including any of the family members listed above for an employee's spouse or registered domestic partner, and up to one individual annually designated by the employee.

- An absence due to domestic abuse, sexual assault, or stalking of the employee or employee's family member, provided the absence is to:
 - Seek medical attention related to physical or psychological injury or disability caused by domestic abuse, sexual assault, or stalking;
 - Obtain services from a victim-services organization;
 - Obtain psychological or other counseling;
 - Seek relocation due to domestic abuse, sexual assault, or stalking; or
 - Seek legal advice or take legal action, including preparing for or participating in any civil or criminal legal proceeding related to or resulting from domestic abuse, sexual assault, or stalking.
- When determined by a health authority or health care professional that the employee or a family member is at risk of infecting others with a communicable disease.
- The closure of the employee's place of business by order of a public official to limit exposure to an infectious agent, biological toxin or hazardous material or other public health emergency.
- To accommodate the employee's need to care for a family member whose school or place of care has been closed by order of a public official to limit exposure to an infectious agent, biological toxin or hazardous material or other public health emergency.
- To accommodate the employee's need to care for a family member whose school or place of care has been closed due to inclement weather, loss of power, loss of heating, loss of water, or other unexpected closure.
- Absence due to business closure for the employee or for a family member's schools, day care closure due to weather or a public emergency.

Upon termination, employees are not paid for earned but unused PTO hours.

Jury Duty

Employees summoned for jury duty are granted unpaid leave in order to serve. Exempt employees may be provided time off with pay, **up to 5 days maximum**, when necessary to comply with state and federal wage and hour laws. Make arrangements with the School Director as soon as you receive your summons, **and provide a copy to your supervisor**. **When jury duty/court appearance does not last longer than a scheduled day/shift, we expect you to return to your job when you are excused during your regular working hours.** **In addition, employees must keep the School Director updated on a day-to-day basis to confirm if called up or able to work.**

For hourly employees, pay for jury duty is not considered time worked and will not be included in the calculation of overtime. To be paid for jury duty/court appearance, employees must submit the attendance/release form received from the courts, with the time of release stated, to their supervisor when returning to work.

Voting Leave

Employees who are scheduled to work during the morning of an election or primary will be granted reasonable time off without loss of pay to enable them to vote during the morning of Election Day. We reserve the right to select the hours you are excused to vote.

Notify the School Director of the need for voting leave as soon as possible.

Military Leave

Employees who are required to fulfill military obligations in any branch of the Armed Forces of the United States or in state military service will be given the necessary time off and reinstated in accordance with federal and state law.

This leave will run concurrently with MN PFML.

The time off will be unpaid, except where state law dictates otherwise. Exempt employees may be provided time off with pay when necessary to comply with state and federal wage and hour laws.

Accrued vacation may be used for this leave if the employee chooses. Military orders should be presented to the School Director and arrangements for leave made as early as possible before departure. Employees are required to give advance notice of their service obligations to the school unless military necessity makes this impossible. You must notify the School Director of your intent to return to employment based on the requirements of the law. Your benefits may continue to accrue during the period of leave in accordance with state and federal law.

Witness Leave

Employees are given the necessary time off without pay to attend or participate in a court proceeding in accordance with state law. We ask that you notify the School Director of the need to take witness leave as far in advance as is possible. This leave may run concurrently with MN PFML.

Exempt employees may be provided time off with pay when necessary to comply with state and federal wage and hour laws.

Bone Marrow and Organ Donation Leave

All employees are eligible to receive up to 40 hours of paid leave to donate bone marrow. This leave may run concurrently with MN PFML.

Please provide the School Director with written physician verification of the purpose and length of each leave.

School Conference and Activities Leave

All employees are allowed up to 16 hours of leave without pay, during a 12 month period, to attend school conferences or school-related activities related to the employee's child, including a foster child, which cannot be scheduled during nonworking hours. This leave may also be used for childcare, pre-kindergarten, or special education program attendance. Employees may use any accrued paid vacation or other paid leave time available for any unpaid leave taken under this policy.

Exempt employees may be provided time off with pay when necessary to comply with state and federal wage and hour laws.

Victims of Crime Leave

The school will grant reasonable and necessary leave from work, without pay, to employees who are victims of a crime to attend or participate in legal proceedings pertaining to the crime. The school will also grant reasonable time off from work without pay to an employee who is the spouse or the next of kin of a victim of a heinous crime to attend or participate in legal proceedings related to the crime. This leave may run concurrently with MN PFML.

Affected employees must give the school reasonable notice that leave under this policy is required.

Exempt employees may be provided time off with pay when necessary to comply with state and federal wage and hour laws.

Parental Leave

All employees are eligible for and are entitled to 12 weeks of unpaid parental leave, regardless of the amount of time they have worked for the school. This leave is provided to a natural or adoptive parent for the birth or adoption of a child. **This leave will run concurrently with MN PFML.**

Provide advance notice of the start of leave and your anticipated date of return. Leave may be taken at any time within 12 months after the birth or adoption of the child.

If the leave is more than one month, employees must notify the School Director at least two weeks prior to returning from such leave.

Employees are entitled to employment in their former position or one with comparable duties, hours and pay. Employees are also entitled to the same benefits and seniority they had before the leave. Employees may return to part-time work during the leave without forfeiting the right to return to full-time work at the end of the leave. The school requires the employee to cover their medical benefits while on leave.

Family Medical Leave of Absence (FMLA)

Employees in need of an FMLA should see the school website for the complete policy revised in 2021.

<https://swanrivermontessori.org/wp-content/uploads/2022/01/Family-and-Medical-Leave.docx-1-1.pdf>

Since MN PFML came into place in 2026, employees should be aware that PFML and FMLA will always run concurrently if an employee is FMLA eligible.

Paid Family Medical Leave of Absence (PFML) - Minnesota

Paid Leave provides payments and job protections when you need time off to care for yourself or your family.

Paid Leave is administered by the State of Minnesota. Paid Leave is funded by both employer and employee premium payments based on the annual premium rate for the year. Eligible employees must apply for Paid Leave online, and the State will determine if the employee is eligible for benefit payments, the benefit payment amount, and the duration of the benefit payments.

To be eligible for Paid Leave, an employee must have earned at least a minimum amount of income. In addition, employees must have a single qualifying event of at least 7 calendar days. The days must be consecutive unless the leave is intermittent. The 7-day qualifying event is a retroactively payable period, not an unpaid waiting period. Bonding Leave does not require a 7-day qualifying event.

Premiums: Paid Leave is funded by both employer and employee premium payments based on the annual premium rate for the year. The School will collect employees' premium payments through a payroll deduction. The School may deduct a maximum amount of 50% of the premium to fund the employee's premium portion. This total premium covers both Medical Leave and Family Leave. See the PFML employee Notice for details on the

amount of tax being deducted from your paycheck. Employees should be aware this tax amount may change each year on 1/1.

Qualifying Events to Use Paid Leave

Eligible employees may use Paid Leave for any of the following qualifying events:

- 1) Medical Leave
 - a) To care for your own serious health condition, including care related to pregnancy, childbirth, and recovery.
- 2) Family Leave
 - a) *Bonding Leave*. To care for and bond with a child welcomed through birth, adoption, or foster placement.
 - b) *Caring Leave*. To care for a family member with a serious health condition.
 - c) *Military Family Leave*. To support a family member called to active duty, which includes:
 - d) *Safety Leave*. To respond to issues related to domestic violence, sexual assault, or stalking for yourself or a family member if such leave is to:

Under this policy, “family member” means an employee’s:

- spouse or domestic partner;
- child (biological child, adopted child, foster child, stepchild, child of a domestic partner, or child to whom the applicant stands in loco parentis, is a legal guardian, or is a de facto custodian);
- parent (biological, adoptive, de facto custodian, foster parent, stepparent, or legal guardian of an employee or the employee’s spouse, or an individual who stood in loco parentis to the employee when the employee was a child);
- legal guardian;
- sibling;
- grandchild;
- grandparent or spouse’s grandparent;
- son-in-law or daughter-in-law; or
- an individual who has a personal relationship with the employee that creates an expectation and reliance that the employee cares for the individual without compensation, regardless of whether or not the employee and the individual reside together.

Duration of Paid Leave: In a benefit year, eligible employees are entitled to 12 weeks of Medical Leave and/or up to 12 weeks of Family Leave; however, an employee’s total amount of leave in a benefit year cannot exceed 20 weeks. A “benefit year” is a 52-week period that begins on the first day an employee uses Paid Leave.

Continuous Leave and Intermittent Leave: You may use Paid Leave continuously (one block of time) or intermittently (separate blocks of time). You may use a maximum of 480 hours (equivalent to 12 weeks) of intermittent leave in a benefit year. You may use intermittent leave in 15 min increments. According to State law, employees are usually not permitted to apply for Paid Leave benefits associated with intermittent leave until the employee has eight hours of accumulated leave time.

How to Take Paid Leave: To take Paid Leave, employees must:

- 1) Notify the Company; and
- 2) apply for Paid Leave benefits online at paidleave.mn.gov
- 3) You can also apply over the phone if needed.

After you apply, you will receive a determination from the Paid Leave Division, which is the official decision from the program about whether your application was approved or denied. If you are approved for Paid Leave payments, the Paid Leave Division will send the payments to your bank account or prepaid debit card, as selected in your application. In addition, any other applicable Leave of Absences will then also run concurrently with the PFM (ie. FMLA).

Notification of Leave to School: You must notify the School of your need for Paid Leave before submitting your Paid Leave application. If the need for Paid Leave is foreseeable, you must notify the School at least 30 days in advance. If the need for Paid Leave is not foreseeable (e.g., change in circumstances, or medical emergency), then you must notify the School as soon as practicable. You must notify the School Director of your need for Paid Leave in writing (email, written notice.)

The State requires employees to submit certain certification/documentation when applying for Paid Leave benefits, depending on the type of qualifying event. The School reserves the right to send employees a written request for employees to provide the School with a copy of the certification that the employee provided to the State. If an employee receives such a written request the employee must provide a copy of the certification to the School as soon as practicable or no less than 15 calendar days (the same as required under FMLA).

Supplemental Benefits: The Company does not offer supplemental benefits to employees while using Paid Leave. Employees may therefore use their accrued PTO during the qualifying period or apply for Paid Leave benefit payments. Under the MN Paid Leave law, employees are not able receive Paid Leave benefit payments when the employee is already receiving their full regular wage or salary from other paid time off.

Interaction With Other Benefits: Employees on unpaid leave or who are being paid by non-employer sources are not eligible for holiday pay, for accruing any new PTO/Vacation or ESST accrual. With some exceptions, employees are generally not eligible to receive Paid Leave benefit payments if the employee is also receiving Social Security disability benefit, unemployment payments or receiving workers' compensation benefit payments.

The Company offers supplemental benefits while out on PFML: Because wage replacement benefits through the PFML program will always be less than 100% of an employee's regular weekly wages, employees may choose to supplement or "top off" payments received through the PFML program in order to bring an employee's weekly wages up to their usual levels. As a result, employees may receive two payments for any given week: one from the PFML program and one from us. Payments from us will be subject to the standard withholdings, including insurance premium payments. Employees must communicate their decision to use PTO or not at the start of their leave.

Other Forms of Leave: All other leaves that are eligible to run concurrently with MN PFML will. Some of these include:

- Federal Family and Medical Leave Act (“FMLA”), The Minnesota Pregnancy and Parenting Leave Act, Military Exigency leave, Safety leave, etc.

Health Insurance: The Company will continue to fund its portion of healthcare insurance and other group insurance premiums while you are on leave. You will be responsible for any portion of health insurance and other group insurance premiums that you paid before you went on leave.

If you receive top-off PTO payments from the School, your share of premiums will be paid through the standard method of collecting health insurance premiums—through a payroll deduction, to the extent authorized by applicable law and no deduction will put a non-exempt employee below the applicable minimum wage.

Employees will be required to pay their health insurance premiums with any paychecks provided to employees from “top-off”. When PTO amounts run-out, employees must make arrangements to continue to make their share of the premium payments on-going while on Paid Leave, please contact your supervisor. If the school is no longer paying out PTO for benefit deductions, then employees must write a check to Swan River Montessori by the 1st of the month, each month, while on leave. If an employee does not pay their benefit premium by the 1st of the month, a notice/reminder will be sent, and after 30 days of non-payment insurance coverage will be terminated. Employees may elect COBRA coverage if desired.

To the extent authorized by applicable law, if you elect not to return to work for at least 30 calendar days at the end of the leave period, you will be required to reimburse the Company for the cost of the health insurance premiums paid by the Company for maintaining healthcare coverage during your leave, unless you cannot return to work because of a serious health condition or other circumstances beyond your control.

Employment Protections: Job protections: Generally, you must be restored to your job or an equivalent position when returning from leave. Job protections take effect 90 days after your date of hire.

No retaliation or interference: The Company will not interfere with or retaliate against you if you apply for or use Paid Leave. If you have questions about this MN Paid Leave policy, please contact Human Resources. You can contact the Paid Leave Division by:

Phone: 651-556-7777 or 844-556-0444 (toll free)

E-mail: paidleave@state.mn.us

Mail: Department of Employment and Economic Development, Paid Leave Division 180 E 5th Street, 12th Floor, Saint Paul, MN.

Bereavement Leave

In the event of the death of an immediate family member, employees are allowed three (3) paid regularly scheduled, consecutive workdays off from work. Immediate family as defined in this policy includes the employee’s:

- | | | |
|------------------------|------------------|------------------|
| • Siblings | • Sibling-in-law | • Spouse |
| • Parent or Stepparent | • Grandchild | • Parents-in-law |
| • Child | • Grandparent | • Uncle and Aunt |

Swan River recognizes individuals who have other significant relations that are not covered by this policy. For these situations and for additional time necessary to attend out-of-town funerals, employees may be allowed to use PTO. The company reserves the right to request proof for a bereavement absence.

Section 6 Employee Benefits

The following is a list of benefits all employees qualify for:

- PERA retirement – Hourly employees automatically contribute a % every pay period. Please ask payroll for the amount.
- TRA retirement – Licensed, salaried employees automatically contribute a % every pay period. Please ask payroll for the amount.
- Paid 30-minute lunch breaks
- Paid time off – see the above table.
- 7 paid holidays for all hourly employees.

Should you choose to receive health benefits from Swan River, the school pays 50% of the employee's monthly premium. The employee would also receive \$1000 (paid out prorated over 24 paychecks for salaried employees or by 20 checks for hourly employees) in an Health Savings Account (HSA) account.

Employees do not pay for extended care so long as you are working for SR on or off campus.

COBRA

You and your covered dependents will have the opportunity to continue medical benefits for a period of up to 36 months under the provisions of the Consolidated Omnibus Budget Reconciliation Act (COBRA) when group medical coverage for you and your covered dependents would otherwise end due to your death or because: **your employment terminates, for a reason other than gross misconduct;**

- your employment status changes due to a reduction in hours.
- your child ceases to be a "dependent child" under the terms of the medical plan.
- you become divorced or legally separated; or
- you become entitled to Medicare.

In the event of divorce, legal separation, or a child's loss of dependent status, you or a family member must notify the plan administrator within 60 days of the occurrence of the event.

The plan administrator will notify the individuals eligible for continuation coverage of their right to elect COBRA continuation coverage.

Social Security

During your employment, you and the school both contribute funds to the federal government to support the Social Security Program. This program is intended to provide you with retirement benefit payments and medical coverage once you reach retirement age.

Unemployment Insurance

Upon separation from employment, you may be entitled to state and federal unemployment insurance benefits. Information about unemployment insurance can be obtained from the School Director.

Workers' Compensation

On-the-job injuries are covered by our Workers' Compensation insurance policy. This insurance is provided at no cost to you. If you are injured on the job, no matter how slightly, **you are required to** report the incident immediately to the School Director. Consistent with applicable state law, failure to report an injury within a reasonable period of time could jeopardize your claim. We ask for your assistance in alerting management to any condition which could lead to or contribute to an employee accident. Additionally, the school will attempt to provide reasonable accommodation which is medically necessary, feasible and does not impose an undue hardship on the school as prescribed by applicable federal, state, or local law.

Daycare Benefits

The school does not offer daycare benefits or a reduction in daycare fees to any employee, board member, or parent volunteer. Teachers and staff members who arrive early or remain after hours for certain teaching duties may utilize the school's before and after school program free of charge. This benefit **is only allowed for parents working at the school while on work time, staff must remain on premises while child is in the program.** Staff children and board member children will receive priority for enrollment in the Children's House Program. However, this benefit legally cannot and does not translate into priority enrollment for any publicly funded charter school program.

Section 7 Workplace Guidelines

Confidentiality of Family Matters

Our professional ethics require that each employee maintain the highest degree of confidentiality when handling family/student matters.

In order to maintain this professional confidence, no employee shall disclose family information to outsiders, including other families or third parties and members of one's own family.

Questions concerning family confidentiality may be addressed to the School Director.

Attendance and Punctuality

Regular and on-time attendance is expected for efficient operations at the School. Excessive absenteeism and tardiness are not only inconvenient but also causes costly problems and affects team morale. While it is recognized that an occasional illness or extenuating personal reasons may cause unavoidable tardiness or absence from work, regular on-time attendance is required for continued employment, and is an essential function of the job.

Employees must contact the Director directly by phone or text to report any absence or lateness prior to their starting time, or as soon as practicable, so that arrangements can be made to redistribute the work, if necessary. Emails are not permitted. If the employee is unable to call, he or she must have someone make the call. **For**

unforeseen absences call or text the Executive Director by 7:00 a.m. or sooner if you know you are too ill to come to school.

The granting of planned PTO is at the discretion of your supervisor and may be on a first come first served basis. Employees, who are going to be absent for more than one day, should contact the Director on each day of their absence, or let the Director know in advance when unable to return for multiple days. The Director reserves the right to ask for a physician's statement in the event of an absence of two or more consecutive days. In addition, the School may request a date upon which the employee will return to work. The employee has 14 calendar days to provide the School with written documentation if it is requested.

Because the students we serve depend on us and our services, excessive tardiness or poor attendance may lead to disciplinary action up to and including termination of employment. An evaluation of your job performance may include an analysis of your attendance and punctuality. Frequent tardiness or absences will prevent you from satisfactorily meeting the performance standards of your job

Employees are responsible to be aware of their attendance record and amount of PTO taken or available. Employees may review their pay stub to see amount of PTO used and may direct questions to the Director. Employees will not be disciplined for using their accrued PTO amount.

Approved Absences: An approved absence is time off scheduled in advance, ideally 14 days in advance or more (30 days for foreseeable PFML), and approved by your supervisor.

An Unapproved Absence is any single unexcused/unscheduled/un-job protected absence with or without notice, and being more than two (2) hours late. PTO will be used for all unscheduled absences. PTO time under this policy will be automatically applied to any time off from work that you may take. If you are absent from work for a reason that is covered by ESST and you do not want PTO to be used for the absence, you must promptly submit a written request stating that PTO should not be applied. **Absences for which PTO is not used may be subject to discipline, even if the absence is for an ESST-covered reason.**

Absences will be disciplined as follows:

1 absence	Verbal warning
2 absence	Written warning
3rd absence	Final written warning
4 th absence	Terminated

A tardy is:

A failure to report to work at the scheduled time, up to 2 hours, including for scheduled overtime and worker's compensation medical appointments. Being on-time here means that you are ready-to-work at your start time daily. This may mean you need to be arriving earlier to ensure you are ready to start at these required times.

Tardiness will be disciplined as follows:

1-3 tardies	Verbal discussion
4-6 tardies	Written warning
7 th tardy	Final written warning
8 th tardy	Terminated

Tardiness warnings stay in the employment file and are cumulative in discipline for up to 3 years before rolling off. We request you please call or text the School Director if you know you will be late.

If you are late to work, you are not allowed to just extend your day. Missed punches may result in disciplinary action up to and including termination. In addition, missed punches will be punched for you at your regular scheduled start or stop time. If you worked early or late you must talk to the School director for approval and to ensure you are paid for this time. However, early and late work time is not encouraged.

Employees are not allowed to clock in early or prior to the time you are scheduled to work. In addition, when your day is scheduled to end, you must clock out on-time.

Job Abandonment: Walking off the job without notification or acknowledgement from the Director and is considered a voluntary termination/resignation.

No Call/No Show Policy: If an employee fails to communicate with a Director as soon as “practicable” on a given day, and does not show up for work on a given day, this will result in a written warning. If an employee does not call in to work or does not show up for work on another occasion or for two consecutive or non-consecutive work days, we accept this as a voluntary resignation decision by the employee and will review any extenuating circumstances that may have prevented the employee from calling in before the employee is removed from payroll. We ask all our employees leaving employment with the school to provide as much notice as possible, minimally two (2) weeks’ notice.

Any employee who fails to return from approved leaves of absence will be considered to have voluntarily terminated employment.

Disciplinary steps may be combined if multiple absences occur within a short period of time which prevent the employee from receiving notification of the lesser disciplinary action. Unscheduled/unplanned/unexcused attendance may be taken into consideration with other performance or disciplinary processes that also impact an employee’s employment with the School. Repeated attendance infractions or a pattern of abuse, will be handled by the School Director as a performance issue. Additionally, management reserves the right to take into account special circumstances that may arise in determining the warning received.

Work-related accidents and illness are covered by Workers' Compensation Insurance, pursuant to the requirements of the laws in Minnesota. The PTO policy outlined above does not apply to those illnesses or injuries that are covered by an applicable Workers' Compensation policy. However, PTO time will be used to cover the first 3 days of time lost due to a workplace injury. And all work comp appointments and follow-ups are required to be attended or may be subject to attendance discipline.

Any time off taken in excess of your accrual balance will be considered unpaid time off, to the extent consistent with applicable law, and is discouraged unless legally protected. This unpaid time off, if excessive, will be addressed as a performance &/or disciplinary issue.

Breaks

Meal & Non-Meal/Personal Breaks

Employees who work 6 or more consecutive hours during a day receive a 30-minute meal break. This 30-minute meal break is paid. Employees will also receive a 15-minute personal break during each 4 hour work period. This 15-minute personal break is paid.

Employees who work less than 4 consecutive hours during a day do not qualify for meal or non-meal/personal breaks.

All meal and non-meal/personal breaks must be coordinated with the employee's immediate (classroom) team members. The School Director, or a designee, may revise break schedule(s) at any time, if deemed necessary.

Employees are expected to report to work and return from scheduled breaks on time. If employees cannot report to work as scheduled, they must notify their supervisor no later than their regular return time. This notification does not excuse the tardiness but simply notifies the supervisor that a schedule change may be necessary.

Employees who do not return from all breaks on-time may be subject to disciplinary action up to and including termination.

Nursing Mothers, Lactating Employees, and Pregnancy Accommodations

Pregnant employees have the right to request and receive reasonable accommodations, which may include, but are not limited to, more frequent or longer breaks, seating, limits to heavy lifting, temporary transfer to another position, temporary leave of absence or modification in work schedule or tasks. An employer cannot require an employee to take a leave or accept accommodation.

Lactating employees have the right to reasonable paid break times to express milk at work. Employers should provide a clean, private and secure room that is not a bathroom near the work area that includes access to an electrical outlet for employees to express milk.

It is against the law for an employer to retaliate, or to take negative action, against a pregnant or lactating employee for exercising their rights under this law. Employees who believe their rights have been violated under this law can contact the Minnesota Department of Labor and Industry's Labor Standards Division at dli.laborstandards@state.mn.us or 651-284-5075 for help.

Employees should access and read the following Minnesota Notice:
https://www.dli.mn.gov/sites/default/files/pdf/WESA_employee_notice.pdf

Conferences and Workshops

The school encourages and may require attendance at conferences that are related to the educational programs of the school and the enhancement of the professional growth of the individual. If you become aware of a seminar that you believe is appropriate for enhancing your skills (and or those of other employees), please bring it to the attention of the School Director. Since these seminars are usually offered only at specified times in a geographical area, please be sure to notify the School Director as far in advance as possible. This way, they can attempt to schedule workloads to accommodate your (and/or other employees') desire to attend the seminar. This training may be taken at a time mutually agreeable to both the staff member and the school. A report concerning the training received may be presented to the school within two weeks of the training or at the next staff meeting, if appropriate.

Contact with the School

For safety reasons, the school should always know your location during business hours. Employees who leave the building during the lunch break must sign in and sign out at the office when exiting and returning to the building during work hours. Employees who have students in a special class and are leaving the building to run an errand or purchase supplies must also sign-in and out at the office.

Standards of Conduct

Each employee always has an obligation to observe and follow the school's policies and procedures, code of ethics, and to maintain proper standards of conduct. If an individual's behavior interferes with the orderly and efficient operation of a department, corrective disciplinary measures will be taken.

Disciplinary action may include a verbal warning, written warning, suspension with or without pay, and/or discharge. The appropriate disciplinary action imposed will be determined by the school. The school does not guarantee that one form of action will necessarily precede another.

For the benefit of employees and to protect the efficiency and productivity of the School, certain rules must be observed by all employees. Engaging in any of the following examples of unacceptable conduct may result in any of the disciplinary actions discussed above. These examples are intended only as a guide and are not all inclusive. They are for the information of all employees. Employees are encouraged to observe the highest standards of professionalism at all times.

- Violation of any School rule;
- Any action that is detrimental to the School's efforts to operate effectively;
- Violation of state, federal or local laws and regulations;
- Negligence or unsafe conduct by failing to use ordinary and reasonable care in the performance of school related duties, which results or may result in injury, property damage or financial loss to the school;
- Using, selling, possessing, manufacturing, distributing, or being under the influence of alcohol, any form of cannabis, or controlled substances (other than those used for bona fide medical purposes) while working (including while on lunch or other breaks) or while on School premises or during school functions;
- Unauthorized possession of weapons;
- Engaging in criminal conduct or acts of violence, or making threats of violence toward anyone on company premises or when representing the School; fighting, provoking a fight, or disorderly conduct detracting from the efficient operation of the School;
- Insubordination or refusing to obey instructions properly issued by a manager pertaining to the employee's work; refusal to help out on a special assignment;
- Threatening, intimidating or coercing fellow employees on or off the premises at any time, for any purpose;
- Theft or unauthorized possession of School property or the property of fellow employees; unauthorized possession or removal of any School property, including documents, from the premises without prior permission from management; unauthorized use of School equipment or property for personal reasons; using School equipment for personal gain;
- Dishonesty; falsification, or misrepresentation on the application for employment or other work records; falsification of reason for a leave of absence or other data requested by the School; alteration of School records or other School documents; falsification of student attendance or other student records.
- Sexual, racial, religious harassment or abuse;
- Disclosure of confidential information or breach of confidentiality; including violation of data privacy laws including open space conversation regarding confidential information.

- Failure to perform assigned work in a manner consistent with School standards of quality and quantity of work;
- Conviction for criminal offenses affecting the employee's ability to adequately perform his or her job;
- Failure to promptly report an absence to the designated person; excessive unexcused absences or lateness;
- Obscene or abusive language toward any manager, employee, vendor, or client; indifference or rudeness towards a client, fellow employee, or vendor; any disorderly/antagonistic conduct on School premises;
- Failure by employees to use timesheets when appropriate; alteration of their own timesheets, records or attendance documents so that they do not accurately reflect hours worked; alteration of another employee's timesheet or records; or coercing someone else to inappropriately alter timesheets or records.

Before or during imposition of any discipline, employees may be given an opportunity to relate their version of the incident or problem at issue and provide any explanation or justification they consider relevant.

The appropriate disciplinary action imposed will be subject to consideration of all factors including broader performance as determined by the school. The school does not guarantee that one form of action will necessarily precede another and reserves the right to implement any level of discipline warranted.

Malicious and Sadistic Conduct Policy

Swan River Montessori Charter School prohibits malicious and sadistic conduct and sexual exploitation by a school staff member, independent contractor, or student enrolled in the school against a staff member, independent contractor or all student in all contexts. Malicious and Sadistic conduct means creating a hostile learning environment by acting with the intent to cause harm by intentionally injuring another without just cause or reason or engaging in extreme or excessive cruelty or delighting in cruelty. Swan River Montessori Charter School prohibits malicious and sadistic conduct involving race, color, creed, national origin, sex, age, marital status, status regarding public assistance, disability, religion, sexual harassment, and sexual orientation and gender identity as outlined in the Minnesota Human Rights Act (Minnesota Statutes, Chapter 363A)

Disciplinary measures for each violation of the policy will be guided by Student Discipline Policy in conformance with Pupil Fair Dismissal Act (Minnesota Statutes, 121A.41-56).

Hazing Prohibition Policy

Swan River Montessori Charter School maintains a safe learning and work environment free from hazing. No student, employee, volunteer, contractor, or other individual associated with the school may plan, direct, encourage, aid, engage in, permit, condone, or tolerate hazing activities. Hazing includes any act that creates a substantial risk of harm to a student or individual for purposes of initiation into, affiliation with, or participation in any school-related group, activity, or organization. Retaliation against any person who reports hazing in good faith is strictly prohibited. Any employee or student found to have engaged in hazing, retaliation, or false reporting may be subject to disciplinary action up to and including termination, suspension, expulsion, or exclusion from school activities, consistent with school policy and applicable law. All employees are expected to immediately report suspected hazing incidents to school administration.

Access to Personnel Files

Employees have the opportunity to review their personnel file upon written request, once every six months, unless the employee is separated from the school. The school will comply with a request within seven working

days if the personnel record is located within the state and within 14 working days if the record is located outside the state. A former employee may review the record once each year after separation for as long as the personnel records are maintained. The personnel record subject to review shall include job applications, wage or salary history, warning or termination notices, fringe benefits information, attendance records, and performance evaluations. Other information such as letters of reference, results of employer testing, written comments of a personal nature about another employee or written comments made by and kept in sole possession of the employee's supervisor do not form part of the personnel record that is subject to review.

The record will be made available during the school's normal hours of operation and at the employee's place of employment or other nearby location, in the presence of a school representative.

Consistent with applicable law, an employee may have the opportunity to provide a written response, not to exceed five pages, to any disputed information in his/her personnel record.

After reviewing their files, employees may receive a copy of their personnel file upon written request. For more information, contact the School Director.

Families and Public Relations

Our school's reputation is built on excellent service and quality work. To maintain this reputation requires the active participation of every employee.

The opinions and attitudes that families have toward our school may be determined for a long period of time by the actions of one employee. It is sometimes easy to take families for granted, but if we do, we run the risk of losing not only those families, but their associates, friends or family who may also be families or prospective families.

Each employee must be sensitive to the importance of providing courteous treatment in all working relationships.

Social Media—Acceptable Use

In the realm of social media, the differentiation between public and private, and personal and professional domains may lack clarity. Swan River employees should never “friend” a student on any social media platforms. Swan River employees should consider these general social networking/media guidelines when sharing thoughts, views and perspectives.

Use sound judgment

- Post only appropriate and respectful content.
 - **Respect.** Demonstrate respect for the dignity of the school, its employees, its vendors, and its students. A social media site is a public place, and employees should avoid inappropriate comments. For example, employees should not divulge **Swan River** confidential information, or information restricted from disclosure by law on social media sites. Similarly, employees should not engage in harassing or discriminatory behavior that targets other employees or individuals because of their protected class status or make defamatory comments or engage in other behavior that violates the company's policies.
- Use sound judgment in all situations, particularly in the world of social networking/media. Consider potential impacts to others.

- Respect the privacy of students, parents and other staff, at all times staff must protect follow student data privacy laws.
- Maintain a tone that is positive, respectful and inclusive.

Be transparent.

- Even as a Swan River employee, unless one is specifically authorized in writing to represent Swan River as a spokesperson, one must state that the views expressed in postings are their own.
- Be transparent about affiliation with Swan River and role/position held.

Confidentiality: Private information— Employees and Students

Do not publish, post, or release information that is considered confidential or not public. Online 'conversations' are never private.

- NEVER give out or transmit the personal information of students or co-workers, such as addresses, phone numbers, etc.
- ALWAYS respect the privacy of our students and families.
- Do not post pictures of others (students, families or other staff) without their permission. For students, please check to ensure that they have a signed Media Permission slip on file with the Front Office.
- If contacted by the media, always refer them to the Executive Director.
- With confidentiality, err on the side of caution. With questions about what is considered confidential, check in with your School Director.
- Be careful about the type and amount of personal information provided. Avoid sharing personal schedules or situations.

Please be cautious with respect to other websites.

- A significant part of interaction on Twitter, Facebook and the school website involves passing on relevant content or linking to other posts. Do not repost a link without looking at the content first.
- When using Twitter, Facebook and other tools, always follow terms and conditions.

Express only your personal opinions

Never represent yourself as a spokesperson for Swan River. If Swan River is a subject of the content you are creating, be clear and open about the fact that you are an associate and make it clear that your views do not represent those of Swan River, fellow associates, members, customers, suppliers or people working on behalf of the school. If you do publish a blog or post online related to the work you do or subjects associated with the school, make it clear that you are not speaking on behalf of Swan River. It is best to include a disclaimer such as “The postings on this site are my own and do not necessarily reflect the views of Swan River.”

Swan River may monitor content on the Internet. Policy violations may result in discipline up to and including termination of employment.

Do not communicate with current students using personal Social Media accounts. Staff should be using the school phone and group emails/classroom websites to communicate with students. Staff should not be contacting students or any family members on any personal cell phones. In the case of an emergency, make sure to notify your Manager to inform them of such use. “Communication” includes adding students as “friends” on Social Media networks such as Facebook or Instagram and “following” a student on Twitter.

When a student has significant medical conditions that require close monitoring, formal means of communication will be discussed with the student and family and a plan in place that does not include staff personal cell phone use.

Changes in Personal Data

To aid you and/or your family in matters of personal emergency, we need to maintain up-to-date information.

Changes in name, address, telephone number, marital status, number of dependents or changes in next of kin and/or beneficiaries should be given to the School Director promptly.

Care of Equipment

You are expected to demonstrate proper care when using the school's property and equipment. No property may be removed from the premises without the proper authorization. If you lose, break, or damage any property, report it to the School Director at once.

Personal Property

The school is not responsible for loss or damage to personal property. Valuable personal items, such as purses and all other valuables should not be left in areas where theft might occur.

Severe Weather

Severe weather is to be expected during certain months of the year. Although driving may at times be difficult when caution is exercised the roads are normally passable. Except in cases of severe storms, we are all expected to work our regular hours. Time taken off due to poor weather conditions while the school remains open, salaried employees will need to use PTO to cover the absence. Hourly employees may choose to use PTO or otherwise the day is unpaid.

Exempt employees may be provided time off with pay when necessary to comply with state and federal wage and hour laws.

If extreme weather conditions require the closing of the building, you will be notified by the School Director or the Operations Coordinator. The school, if fully closed with no learning day, Salaried employees can choose to work from home (ie. prep time) or take PTO to cover the day. Hourly employees may choose to use PTO or otherwise the day is unpaid. If the school continues to be open in an online learning capacity, then all employees will receive full wages during weather-related closures.

Partial-day closures where school is closed early, the school will pay all employees for the remainder of the day.

Personal Telephone Calls

It is important to keep our telephone lines free for families calls. Although the occasional use of the school's telephones for a personal emergency may be necessary, routine personal calls should be kept to a minimum.

Although personal cell phones are permitted in the School, employees are expected to be with students and must refrain from using phones for personal use during work hours. We expect staff to give their full attention to the students and role-model professional skills in the workplace.

Cell phones must be turned off or set to a silent alert during working hours while on school premises. At no time may cell phones be used in any capacity in front of students or any other adult not employed. Cell phones are allowed to be used away from students on break-times, in an emergency or when student disciplinary issues arise to alert the School Director or others.

Staff may use cell phones to communicate with the School Director while on recess or at gym for emergencies and school-related communication. However, staff full-attention should be with the students and not on any personal cell-phone business.

Staff must at all times be careful about sharing any information over cell phone that may be protected student data under FERPA or state Data Privacy laws. Any employee who violates Data Privacy laws will be subject to disciplinary action up to and including termination.

Violations of this policy will be subject to the highest forms of discipline, up to and including termination.

Electronic Mail Monitoring

We recognize your need to be able to communicate efficiently with fellow employees and families. Therefore, we have installed an internal electronic mail (e-mail) system to facilitate the transmittal of business-related information within the school and with our families.

Our school's policies against sexual and other types of harassment apply fully to the e-mail system. Violations of those policies are not permitted and may result in disciplinary action, up to and including discharge. Therefore, employees are also prohibited from the display or transmission of sexually explicit images, messages, ethnic slurs, racial epithets, or anything which could be construed as harassment or disparaging to others.

Employees shall not use unauthorized codes or passwords to gain access to others' files.

Violation of this policy may result in disciplinary action, up to and including discharge.

For business purposes, management reserves the right to enter, search and/or monitor the school's private e-mail system and the files/transmission of any employee without advance notice and consistent with applicable state and federal laws. Employees should expect that communications that they send and receive by the school's private e-mail system will be disclosed to management. Employees should not assume that communications that they send and receive by the school's private e-mail system are private or confidential.

Voicemail Monitoring

We recognize your need to be able to communicate efficiently with fellow employees and families. Therefore, we have a voice mail system to facilitate the transmittal of school-related information within the school and with our families.

Our school's policies against sexual and other types of harassment apply fully to the voicemail system. Violations of those policies are not permitted and may result in disciplinary action, up to and including discharge. Therefore, employees are also prohibited from the transmission of sexually explicit messages, ethnic slurs, racial epithets, or anything which could be construed as harassment or disparaging to others.

All voicemail passwords must always be made available to the school. Please notify the School Director if you need to change your password.

Violation of this policy may result in disciplinary action, up to and including discharge.

For business purposes, management reserves the right to enter, search and/or monitor the school's private voicemail system and the voicemail of any employee without advance notice and consistent with applicable state and federal laws. Employees should expect that communications that they send and receive by the school's private voicemail system will be disclosed to management. Employees should not assume that communications that they send and receive by the school's private voice mail system are private or confidential.

Internet Usage

As a growing school, we recognize the need to stay on the cutting edge of technology. This is one of the reasons we allow employees to have access to the Internet.

The Internet is intended for business use only. Use of the Internet for any non-business purpose, including but not limited to, personal communication or solicitation, purchasing personal goods or services, gambling and downloading files for personal use, is strictly prohibited.

Our school's policies against sexual and other types of harassment apply fully to Internet usage, including the use of instant messaging programs. Violations of those policies are not permitted and may result in disciplinary action, up to and including discharge. Therefore, employees are also prohibited from displaying, transmitting, and/or downloading sexually explicit images, messages, ethnic slurs, racial epithets, or anything which could be construed as harassment or disparaging to others. Consistent with applicable federal and state law, the time you spend on the Internet may be tracked through activity logs for business purposes. All abnormal usage will be investigated thoroughly.

Employees learning of any misuse of the Internet shall notify a member of management.

Violation of this policy may result in disciplinary action up to and including discharge.

Dress Policy

Employees are expected to maintain the highest standards of personal cleanliness and present a neat, professional appearance at all times.

Our families' satisfaction represents the most important and challenging aspect of our business. Whether or not your job responsibilities place you in direct family contact, you represent the school with your appearance as well as your actions. The properly attired individual helps to create a favorable image for the school, to the public and fellow employees.

All employees should use discretion in wearing attire that is appropriate for the office and family interaction.

Personal Hygiene

Maintaining a professional, business-like appearance is particularly important to the success of our school. Part of the impression you make on others depends on your choice of dress, personal hygiene, and courteous behavior. A daily regimen of good grooming and hygiene is expected of everyone. Please ensure that you maintain good personal hygiene habits. While at work, you are required to be clean, dressed appropriately and well groomed.

Data Privacy and Confidentiality

Protecting our school's information is the responsibility of every employee, and we all share a common interest in making sure it is not improperly or accidentally disclosed. Do not discuss the school's confidential business with anyone who does not work for us. You may be required to sign a nondisclosure agreement as a condition of your employment, in accordance with state and federal law.

All telephone calls regarding a current or former employee's position/compensation with our school must be forwarded to the School Director.

Conflict of Interest/Code of Ethics

A school's reputation for integrity is its most valuable asset and is directly related to the conduct of its officers and other employees. Therefore, employees must never use their positions with the school, or any of its families, for private gain, to advance personal interests or to obtain favors or benefits for themselves, members or their families or any other individuals, corporations or business entities.

The school adheres to the highest legal and ethical standards applicable in our business. The school's business is conducted in strict observance of both the letter and spirit of all applicable laws and the integrity of each employee is of utmost importance.

Employees of the school shall conduct their personal affairs in such a fashion that their duties and responsibilities to the school are not jeopardized and/or legal questions do not arise with respect to their association or work with the school.

Parking

Free parking facilities are available to employees.

The school is not responsible for loss, damage, or theft of your vehicle. Therefore, we suggest that you lock your vehicle doors.

Contact with the Media

All media inquiries regarding the school and its operations must be referred to the School Director. Only the School Director is authorized to make or approve public statements pertaining to the school or its operations. No employees, unless specifically designated by the School Director, are authorized to make those statements.

Office Supplies

Our school maintains a stock of basic office supplies such as pens, paper clips, staples, note pads, etc. used on a day-to-day basis by employees.

If you need additional items not regularly stocked, please speak to the Operations Coordinator to place a special order.

All office supplies are for school use only and should not be removed from the school for non-school use. Violations of this policy may result in disciplinary action up to and including discharge.

Materials

Materials made during school time with school funds belong to the school. Materials made by the teachers at home with their own materials are the property of the teacher. Materials made by the

teacher at home that use school paper, markers, laminating machine, and general office supplies are the property of the school for a period of three (3) years, after which time they may be returned to the teacher. Materials made by parents volunteers, from donated or school supplies, belong to the school. Materials made by the teacher at home, which involve building or purchased materials from school funds, such as bird feeders, desks, bulletin boards, shelves, and large instructional materials, remain school property.

Procedure for Staff Reimbursement

If a staff member makes a purchase on behalf of Swan River Montessori Charter School, the following procedure must be followed:

- 1) When possible, purchases will be completed via the main office.
- 2) When it is not possible to order through the office, a staff member may purchase an item(s) that is for educational/classroom purposes only. All purchases must be within the confines of the classroom budget of \$1000 per classroom per school year unless specific permission is granted by the School Director.
- 3) The staff member must ensure that the purchase is tax exempt as SRMCS is a non-profit organization filed with the State of Minnesota. If tax is included, SRMCS will NOT reimburse the staff member for the amount taxed.
- 4) To obtain reimbursement, the staff member must complete a Reimbursement/Check Request form which includes the name of the store where the item(s) was purchased, the total amount spent (not including any taxes), and the corresponding UFARS number. S/he must sign and date the form or it is not considered valid. One form may be used for numerous purchases.
- 5) All original receipts must be attached to the Reimbursement/Check Request form and handed into the School Director in the main office within a reasonable time frame, but no less than monthly. The School Director will approve or deny the reimbursement request. If approved, the School Director will sign the form and submit it to the Operations Coordinator.
- 6) Once received, the Operations Coordinator submits the form and receipt(s) to the Business Service Provider for processing.
- 7) The reimbursement check is mailed to SRMCS and placed in the employee's mailbox in the main office or mailed to the employee's home address.

Recording Devices in the Workspace

Except as otherwise provided for in this policy, no employee may photograph, tape, or otherwise record any person, document, conversation or communication, or activity that in any way involves the school or employees of the school, any families or any other individual with whom the school is doing business or intending to do business in any capacity (for example, vendors, suppliers, consultants, attorneys, or independent contractors). The authorized copying of documents in the ordinary course of business for the benefit of the school is not prohibited by this policy.

“Photographing,” “taping,” and “recording” under this policy includes taking still or video pictures (film or digital), or recording of any conversation or communications, regardless of whether the conversation or communication takes place in person, over the telephone, or via any other communications device or equipment, and regardless of the method used to tape or record (for example, tape recorder, video recorder, mechanical recording, or wire-tapping equipment), and regardless of where the conversation or communication takes place, i.e., whether on or off the school's premises. “Taping” or “recording” also includes photographing or recording digital images through cameras of any kind (for example, camera phones, PDA cameras, or concealed cameras). Limited exceptions will apply where the photographing, taping, or recording is being conducted by an individual who has been provided advance written authorization for the activity by an authorized member of school management.

Violations of this policy may result in disciplinary action against the offending employee(s), up to and including termination of employment. Where the conduct engaged in is illegal, violators may also be subject to prosecution under applicable federal, state, or local laws.

If You Must Leave Us

Should you decide to leave your employment with us, we ask that you provide the School Director with at least two weeks' advance notice. Your thoughtfulness is appreciated and will be noted favorably should you ever wish to reapply for employment with the school.

All school property must be returned upon termination. This includes any classroom materials that were created using school-purchased supplies including, but not limited to binders and laminated materials. Should an employee refuse to return school-owned materials or it is discovered that an employee took school-owned materials, the school may take action to recoup any replacement costs and/or seek the return of school property through appropriate legal recourse.

You should notify the school if your address changes during the calendar year in which termination occurs so that your tax information will be sent to the proper address.

Upon termination, employees are not paid for earned but unused PTO hours.

Section 8: Safety in the Workplace

Each Employee's Responsibility

Safety can only be achieved through teamwork at our school. Each employee, supervisor and manager must practice safety awareness by thinking defensively, anticipating unsafe situations, and reporting unsafe conditions immediately.

Please observe the following precautions:

- Notify the School Director of any emergency. If you are injured or become sick at work, no matter how slightly, you must inform the School Director immediately.
- Injured staff must complete the First Report of Injury and turn into School Director within 24 hours.
- The use of alcoholic beverages, any form of cannabis or illegal substances during working hours will not be tolerated. The possession of alcoholic beverages or illegal substances on the school's property is forbidden.
- Use, adjust, and repair machines and equipment only if you are trained and qualified.
- Know the proper lifting procedures. Get help when lifting or pushing heavy objects.
- Know the locations, contents and use of first aid and fire-fighting equipment.
- Comply with OSHA standards and/or applicable state job safety and health standards as written in our safety procedures manual.
- Unauthorized possession, use, or sale of weapons, firearms, or explosives on work premises is forbidden.
- Understand your job fully and follow instructions. If you are not sure of the safe procedure, do not guess, ask the school Director.
- A violation of a safety precaution is in itself an unsafe act. A violation may lead to disciplinary action, up to and including discharge.

Bloodborne Pathogens Exposure Control

To protect employees who may reasonably anticipate being occupationally exposed to blood and other potentially infectious materials during work tasks, our school has instituted a bloodborne pathogens exposure control program.

Briefly, our program includes an employee exposure determination, information, and training about bloodborne pathogens, Universal Precautions, safe work practices, personal protective equipment, and housekeeping measures to help reduce the risks of occupational exposure. Procedures to be used following an exposure incident and necessary record keeping are also included. These matters are discussed in our written infection control plan, which is available to you in accordance with the plan.

Further information about our bloodborne pathogens exposure control program will be provided to affected employees and may be obtained from the School Director.

Fire Drills, Lock Downs, and Tornado Drills

Fire drills, lock downs, and tornado drills are scheduled periodically throughout the year. These drills are an important aspect of employee safety. We expect your complete cooperation during these drills. If you have any questions concerning procedures, see the School Director.

Workplace Violence

Violence by an employee or anyone else against an employee, supervisor or member of management will not be tolerated. The purpose of this policy is to minimize the potential risk of personal injuries to employees at work and to reduce the possibility of damage to school property in the event someone, for whatever reason, may be unhappy with a school decision or action by an employee or member of management.

If you receive or overhear any threatening communications from an employee or outside third party, report it to the school director at once. Do not engage in either physical or verbal confrontation with a potentially violent individual. If you encounter an individual who is threatening immediate harm to an employee or visitor to our premises, contact an emergency agency (such as 911) immediately.

All reports of work-related threats will be kept confidential to the extent possible, investigated and documented. Employees are expected to report and participate in an investigation of any suspected or actual cases of workplace violence.

Violations of this policy, including your failure to report or fully cooperate in the school's investigation, may result in disciplinary action, up to and including discharge.

Workplace Searches

To protect the property and to ensure the safety of all employees, families and the school, the school reserves the right to conduct personal searches consistent with state law, and to inspect any packages, parcels, purses, handbags, brief cases, lunch boxes or any other possessions or articles carried to and from the school's property. In addition, the school reserves the right to search any employee's office, desk, files, locker, equipment or any other area or article on our premises. In this regard, it should be noted that all offices, desks, files, lockers, equipment, etc. are the property of the school, and are issued for the use of employees only during their employment. Inspection may be conducted at any time at the discretion of the school.

Persons entering the premises who refuse to cooperate in an inspection conducted pursuant to this policy may not be permitted to enter the premises. Employees working on or entering or leaving the premises who refuse to cooperate in an inspection, as well as employees who after the inspection are believed to be in possession of stolen property or illegal substances, will be subject to disciplinary action, up to and including discharge, if upon investigation they are found to be in violation of the school's security procedures or any other school rules and regulations.

Good Housekeeping

Good work habits and a neat place to work are essential for job safety and efficiency. You are always expected to keep your place of work organized and materials in good order. Report anything that needs repair or replacement to the school director.

Smoking in the Workplace

Our school is committed to providing a safe and healthy environment for employees and visitors. Smoking is not permitted.

Concealed Weapons

Possession, use or sale of weapons, firearms or explosives on work premises, while operating school machinery, equipment or vehicles for work-related purposes or while engaged in school business off premises is forbidden except where expressly authorized by the school and permitted by state and local laws. This policy applies to all employees, including but not limited to, those who have a valid permit to carry a firearm. This policy does not apply to firearms stored in the employee's locked motor vehicle.

Employees who are aware of violations or threats of violations of this policy are required to report such violations or threats of violations to the school director immediately.

Violations of this policy will result in disciplinary action, up to and including discharge.

In an Emergency

Any member of the office staff should be notified immediately when an emergency occurs. Emergencies include all accidents, medical situations, bomb threats, other threats of violence, and the smell of smoke. If any member of the office staff is unavailable, contact the nearest school official.

Should an emergency result in the need to communicate information to employees outside of business hours, any member of the office staff will contact you. Therefore, it is important that employees keep their personal emergency contact information up to date. Notify any member of the office staff in the event this information changes.

When events warrant an evacuation of the building, you should follow the instructions of any member of the office staff. You should leave the building in a quick and orderly manner. You should assemble at the pre-determined location as communicated to you by any member of the office staff to await further instructions or information.

Please direct any questions you may have about the school's emergency procedures to any member of the office staff.

Drug and Alcohol-Free Workplace

The school has vital interests in ensuring a safe, healthy, and efficient working environment for our employees, their co-workers, and the families we serve. The unlawful or improper presence or use of controlled substance, any form of cannabis or alcohol in the workplace presents a danger to everyone. For these reasons, we have established as a condition of employment and continued employment with the school the following substance abuse policy.

Employees are prohibited from reporting to work or working while using illegal or unauthorized substances(including cannabis). Employees are prohibited from reporting to work, or working when the employee uses any controlled substance (physician prescribed), except when the use is pursuant to a doctor's

orders and the doctor advised the employee that the substance does not adversely affect the employee's ability to safely perform his or her job duties.

In addition, employees are prohibited from engaging in the unlawful or unauthorized manufacture, distribution, sale or possession of illegal or unauthorized substances, including drugs, all forms of cannabis and alcohol in the workplace including: on school paid time, on school premises, in school vehicles, or while engaged in school activities on or off premises. Employees are also prohibited from reporting for duty or remaining on duty with any alcohol in their systems. Employees are also prohibited from consuming alcohol during working hours, including meal and break periods, including during work-related training, conferences, overnight field trips, etc..

Your employment or continued employment with the school is conditioned upon your full compliance with the foregoing substance abuse policy. Any violation of this policy may result in disciplinary action, up to and including discharge.

Consistent with its fair employment policy, the school maintains a policy of non-discrimination and reasonable accommodation with respect to recovering addicts and alcoholics, and those having a medical history reflecting treatment for substance abuse conditions. We encourage employees to seek assistance before their substance or alcohol use renders them unable to perform their essential job functions or jeopardizes the health and safety of themselves or others. The school will attempt to assist its employees through referrals to rehabilitation, appropriate leaves of absence and other measures consistent with the school's policies and applicable federal, state, or local laws.

The school further reserves the right to take any and all appropriate and lawful actions necessary to enforce this substance abuse policy including, but not limited to, the inspection of school issued lockers, desks or other suspected areas of concealment, as well as an employee's personal property when the school has reasonable suspicion to believe that the employee has violated this substance abuse policy.

This policy represents management guidelines. For more information, please speak to the school director.

Section 9: SRMCS Educator Code of Ethics

Adopted as part of the Employee Handbook by the Board of Directors in August 2017

1. **CONFIDENTIALITY:** includes personal information about children and families, organizational problems, and individual faculty matters. All records, files, conversation, and conferences are held for the benefit of the child and are strictly confidential.
2. **RESPECT FOR THE CHILD:** includes a positive, optimistic attitude about children, a cooperative spirit, a nurturing of independence, a recognition of unique individuality, trust in the child's work, finding the right activity, and listening to and observing in order to follow the child. One should avoid pride and anger, speaking ill of the child, sarcasm, teasing, over-reacting to misbehavior, and implied reward and punishment. When making presentations, the child's interest level should be considered so that the teacher stops before the child tires. Phrasing of instructions should be direct and to the point. When communicating with the child comes down to the child's height. Greet and welcome each child into the environment as they enter.
3. **PREPARATION OF THE ENVIRONMENT:** includes developing a complete Montessori, or extended day program, caring for the environment, including animals, plants, and materials, and initiating change in order to provide new stimulation.
4. **PARENT EDUCATION:** includes the dissemination of Montessori principles, recognition of parents as primary educators, accessibility for information regarding individual children, and communication about general classroom activities.
5. **GOOD STAFF RELATIONS:** include playing and working cooperatively, remaining non-judgmental of staff, exerting trust, maximizing communication through staff meetings, celebrating through holiday events, program support, and school-wide projects. Malicious comments, gossip, and other harmful behaviors should be ignored and suppressed.
6. **PROFESSIONAL IMPROVEMENT:** includes participation in Montessori and Early Childhood workshops, as well as keeping abreast of current educational developments.
7. **PROFESSIONAL CONDUCT:** includes keeping private affairs outside of the workplace, maintaining agreements at all levels regarding performance of duties, and meeting the needs of individual children and staff.

Section 10: Receipt of Employee Handbook and Employment-At-Will Statement

This is to acknowledge that I have received a copy of the Swan River Montessori Charter School Employee Handbook and understand that it sets forth the terms and conditions of my employment as well as the duties, responsibilities and obligations of employment with the school. I understand and agree that it is my responsibility to read the Employee Handbook and to abide by the rules, policies and standards set forth in the Employee Handbook.

I also acknowledge that my employment with Swan River Montessori Charter School is not for a specified period of time and can be terminated at any time for any reason, with or without cause or notice, by me or by the school. I acknowledge that no oral or written statements or representations regarding my employment can alter the foregoing. I also acknowledge that no manager or employee has the authority to enter into an employment agreement—express or implied—providing for employment other than at-will.

I also acknowledge that, except for the policy of at-will employment, the school reserves the right to revise, delete and add to the provisions of this Employee Handbook. All such revisions, deletions or additions must be in writing and must be signed by the Director of the school. No oral statements or representations can change the provisions of this Employee Handbook. I also acknowledge that, except for the policy of at-will employment, terms, and conditions of employment with the school may be modified at the sole discretion of the school, with or without cause or notice, at any time. No implied contract concerning any employment-related decision, term of employment or condition of employment can be established by any other statement, conduct, policy, or practice.

I understand that the foregoing agreement concerning my at-will employment status and the school's right to determine and modify the terms and conditions of employment is the sole and entire agreement between me and Swan River Montessori Charter School concerning the duration of my employment, the circumstances under which my employment may be terminated and the circumstances under which the terms and conditions of my employment may change. I further understand that this agreement supersedes all prior agreements, understandings and representations concerning my employment with the school.

If I have questions regarding the content or interpretation of this Employee Handbook, I will bring them to the attention of my supervisor.

PRINTED NAME OF EMPLOYEE: _____

DATE: _____

EMPLOYEE SIGNATURE: _____

Please sign and return this form to the School Director within 48 hours of receipt of the Employee Handbook. This completed form is required for employment at Swan River Montessori Charter School.

Swan River Montessori Charter School

Parent & Student Handbook

2026- 2027

Adopted by the Swan River Board of Directors August 2005
Revisions adopted by the Swan River Board of Directors 8.24.26

Mission of Swan River Montessori Charter School

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.

Vision of Swan River Montessori Charter School

Swan River Montessori Charter School's vision is to employ an inter-disciplinary 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.

Swan River Montessori Charter School welcomes students of any race, color, creed, religion, national or ethnic origin, sex, and sexual orientation. Swan River Montessori Charter School does not discriminate on the basis of race, color, creed, religion, national or ethnic origin, sex, status with regard to public assistance, disability, or sexual orientation in the administration of its educational policies or programs. All related policies are posted on the school's web site at www.swanrivermontessori.org

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School Information

Arrival and Dismissal

Swan River Montessori Charter School and Children's House classes are held Monday through Friday and follow the Monticello School Calendar (District #882).

7:00-7:50 a.m.	Extended Morning Care
7:50 – 2:10	Grades PreK – 6 th
2:10-5:00 p.m.	Extended Afternoon Care

Arrival & Dismissal Procedures

Having a designated drop off/pick up helps eliminate the confusion as to the direction of traffic, where and how to drop off/pick up children, and most importantly, knowing all children will be safely accompanied into and out of the school.

Students who are dropped off or picked up during the school day by a parent or designee will be released through the office only. Parents or the designee are required to sign their child in/out. Students are not permitted to leave the school building during school hours without a proper permission from the parent or guardian. This policy is to assure the safety and whereabouts of your child at all times

Tardiness & Absenteeism

Regular attendance is necessary to obtain the maximum benefits of our instructional program and is correlated to successful academic achievement. Consistent attendance is one means by which a student develops responsibility and self-discipline. For this reason, student absence from school should be limited to genuinely unavoidable circumstances. Attendance records are an important part of your child's permanent school file. Our school day runs from 7:50 a.m. through 2:10 p.m.

If your child must be absent, please call the main office as soon as possible so the school is aware the child is not in attendance. All tardies (arrival after 7:50 a.m.) and absences require either a phone call to the school, a written note/email, or a prior in-person verbal notification from the parent or guardian. If proper notification is not received, the tardy/absence is counted as unexcused.

Your child's success in school depends on consistent attendance. Therefore, parents will be notified if there are excessive absences and/or tardiness. Please see Board Approved Attendance Policy for further information (located in the main office as well as on our web site at). It is recommended that elective medical or dental appointments be made after school hours and during vacations when possible.

Swan River Montessori Charter School discourages any trips during the school year on days school is in session, other than for emergencies. Families taking vacation during the school year should give the office staff and classroom teacher advance notice.

Drop Off / Pick Up Times & Areas

For all students arriving by vehicle, the assigned drop off time is from 7:35-7:45 a.m. Pick up times are from 2:10-2:20 p.m. During these designated times, the assigned entrance, located on the **south side of the building on 5th Street (NOT the front door on Maple Street)**, will have staff members available to assist students to and from your vehicle and the school building. Please note that these staff members will assist in your child getting in and out of the vehicle, however, they are not able to assist your child with safety belts and/or car seats.

It is important that no cars are parked on 5th Street on the south side of the building between 7:35-8:15 and 2:00-2:30.

All students are expected to proceed to their lockers. Outside shoes and outdoor clothing should be properly placed in the locker. A separate pair of clean, inside shoes/slippers should be put on. The child will then proceed immediately to the classroom. Every student is required to be in the classroom by 7:50 a.m. After 7:50, students are marked tardy.

All students should be picked up by 2:30 p.m. The staff is obligated to remain with your child until a responsible adult picks him/her up. Please be respectful of their professional and personal time. If your child is sent to extended care due to non-pick up by 2:30, there will be a charge of \$20.00.

Extended Care Drop Off / Pick Up

Swan River opens daily at 7:00 a.m. and remains open after school until 5:00 p.m. to accommodate pre-registered extended care students. When dropping off a child(ren) for extended care, please park your vehicle and accompany your child(ren) to and from the extended care classroom. All children will remain under the supervision of the extended care staff until regular school classes begin in the morning and/or until the child is picked up by a parent or designee after school.

For more information regarding the extended care program, please contact our main office. Signed contracts and pre-payment are required for participation.

Change in Departure Plans

If the student's usual after-school departure plan has been changed (i.e. going home with someone else or should go to the carpool line instead of boarding the bus), a signed and dated note or a phone call **MUST** be received by 1:00 that day. Under NO circumstances will a child be allowed to alter his/her end-of-day without appropriate permission. We also require that any alternate plans be made with both parties in advance to avoid confusion and miscommunication during or after the school day. The safety of our students is our greatest concern and this includes assuring a communicated departure plan.

Busing Procedure

If you live within the Monticello School District boundaries, you should receive a letter from Hoglund Transportation, District #882's contracted bussing company, with your child's bus number. Swan River cannot provide you with specific bussing information. All communication should be directed to the contracted bussing company.

To School:

1. Your child will be bused from your home or day care location to Pinewood or Little Mountain Elementary.
2. When the bus arrives at Pinewood or Little Mountain Elementary, all children will exit from their bus when the school bell rings. Swan River students will go to the designated Swan River bus and board. The shuttle bus will then depart for Swan River.
4. The Swan River shuttle buses will transport the children to the school and drop them off at the Maple Street entrance (front entrance of the school). A staff member will be at the entrance to make sure that the children safely disembark from the bus and enter the school building. All students are expected to proceed to their lockers. Outside shoes and outdoor clothing should be properly placed in the locker. A separate pair of clean, inside shoes should be put on. The child will then proceed immediately to the classroom. Every student is required to be in the classroom by 9:00 a.m. Loitering or playing in the hallway is not permissible.

From School:

1. The child will be excused from the classroom to go to the locker. The student should change into his/her outside shoes and outdoor clothing. Inside shoes should be properly placed in the locker. The child should then proceed to the front door on Maple Street to meet the shuttle buses to Pinewood and Little Mountain Elementary schools.
2. All students will be escorted from the building by a staff member who confirms each child is boarding the appropriate bus.
3. The Swan River shuttle buses will then proceed to Pinewood and Little Mountain Elementary schools where students will board the afternoon buses taking them to either home or day care.

Change in Departure Plans

If the student's usual after-school departure plan has been changed (i.e. going home with someone else or should go to the carpool line instead of boarding the bus), a signed and dated note or a phone call MUST be received by 1:00 that day. Under NO circumstances will a child be allowed to alter his/her end-of-day without appropriate permission. We also require that any alternate plans be made with both parties in advance to avoid confusion and miscommunication during or after the school day. The safety of our students is our greatest concern and this includes assuring a communicated departure plan.

Calendar

Swan River Montessori Charter School's calendar correlates with the Monticello Public Schools calendar. The 2026-2027 school year begins on Tuesday, September 8, 2026 and ends on Thursday, June 4, 2027. A copy of the school calendar can be found on the SRMCS website.

Change of Address

Please notify the school office promptly concerning changes of address, phone numbers or emergency information, including email addresses. It is very important that we keep our records current.

Contacting Teachers

During the school year, the office is open from 7:15 a.m. to 2:45 p.m. Teachers may or may not be reachable by telephone during the school day. However, parents are always welcome to leave a message at the office or send an email. Teachers will check email daily and will respond as soon as possible. Teachers are available to meet with parents or guardians before or after school by appointment.

Dual Reporting

The names and addresses of parents or guardians are included in a student's file. In the case of a student whose parents' marriage has been dissolved, a certified copy of the Order of Dissolution, as well as any subsequent modification of the order, needs to be on file. Unless otherwise decreed in the order, information commonly made available to parents or guardians of any student will be provided to both parents and guardians.

Early Childhood Screening

Early Childhood Screening is a requirement of the State of Minnesota prior to admission to Kindergarten for public schools. This does not apply to charter schools. However, Swan River still highly recommends having this screening done as it helps identify, at an early stage, possible learning or health concerns, and also helps to identify children who may benefit from school and community resources which may help with their development. This free screening is offered through the Monticello School District. It is preferred that the screening be completed when the child is 3 or 4. The screening program runs from the end of September to the first of May. It is offered to all preschool children and includes vision, hearing, speech and developmental screening. A discussion with a school nurse will review the dental, nutritional and immunization status of the child. To schedule an appointment, please call 763-272-2972 or go to <https://eec.monticello.k12.mn.us/programs/early-childhood-screening>

Email List Serves

Swan River maintains several email list serves for the use of parents and staff. All families will be included in the All-School List Serve unless the school is notified otherwise. If you do not wish to be included, or you are not receiving these emails, please email kirstenh@swanrivermontessori.org

Employee Directory

The employee directory can be found on the website.

Employment Background Checks

Swan River Montessori Charter School will seek criminal history background checks for all applicants who receive an offer of employment.

In accordance with Minnesota Statutes 123B.03 Subd. 1(e) Swan River Montessori Charter School Notifies parents and guardians that the school requires criminal history background checks on employees and on other individuals who provide services to the school.

Positions subject to criminal history background checks include, but are not limited to:

- Licensed teachers and instructional staff
- Paraprofessionals and educational assistants
- Administrators and office staff
- Extended care staff
- Coaches, advisors and activity leaders
- Substitute teachers and temporary staff
- Contractors, consultants and service providers who may have direct contact with students
- Volunteers and chaperones who supervise or regularly interact with students

This school's hiring authority retains discretion, as permitted by law, to determine whether a criminal history background check is required for other individuals providing services to the school based on the nature of the position, the individual's access to students, and the level of supervision involved.

Background checks are conducted in accordance with applicable Minnesota law and school policy to help maintain a safe learning environment for all students.

Enrollment

Swan River Montessori Charter School is a public school. Enrollment at Swan River Montessori Charter School is open to the entire community. We do not discriminate on the basis of race, color, creed, sex, or place of national or ethnic origin. Open enrollment for the fall begins the previous January. Swan River Montessori Charter School accepts applications for student vacancies throughout the year. Public announcements regarding openings at each grade level are based on projected enrollment. If there are no vacancies, applicants will be placed on grade-specific waiting lists. Enrollment is solely dependent on space availability. Swan River Montessori Charter School must give enrollment preference to a Minnesota resident pupil over pupils that do not reside in Minnesota. Swan River Montessori Charter School must require a pupil who does not reside in Minnesota to annually apply to enroll in accordance with Minnesota Statutes, section 124E.11, paragraphs (a) to (f). Siblings of currently enrolled students and the children of faculty are given priority enrollment. See policy 509, "Admissions and Enrollment", on the Swan River website for more information. According to our charter agreement, all spaces in the charter school filled during open enrollment are drawn from waiting lists that are constructed by lottery. If space exists after this time, children are admitted from waiting lists that are built on a first-come, first-served basis. If there are more applications for a grade level than there are vacancies, a drawing will be

conducted in accordance with the process specified in the charter agreement (Please refer to the school office for further information.)

Fees

All Montessori materials, novels and library books, textbooks, computers and other resource materials are supplied by Swan River Montessori Charter School. Teachers will present the appropriate use and care of these materials to their students. If through carelessness or intent, a student damages instructional materials or classroom furniture, a replacement cost may be assessed. Students are expected to provide their own school supplies. Students may be asked to pay certain other fees or deposits, including (not an inclusive list):

- An instructional supplies fee will be assessed to each student. In place of a school supply list, the school purchases necessary classroom supplies for students. Payment is due before the beginning of each school year.
- Children's House snack fee will be assessed to each student. This fee is used to purchase daily snacks throughout the school year. This fee should be remitted to the office by the beginning of each school year.
- Cost for materials for a class project that exceeds minimum requirements and is kept by the student.
- Items of personal use or products that a student has an option to purchase such as yearbooks.
- Field trips considered supplementary to the district's educational program.
- Admission fees or costs to attend or participate in optional extracurricular activities and programs.
- Tuition and After School Care for preschool program.

Grievance Policy

Swan River Montessori Charter School strives to create and maintain a safe, comfortable, and enjoyable learning environment for every child, regardless of sex, race, gender, or ability level. We do this in several ways:

- By respectfully treating every person as an individual and encouraging each individual's maximum developmental potential;
- By recognizing that each person is essential to the success and growth of not only him or herself, but of other students and the school in general;
- By maintaining direct communications with each family and ensuring that each family can speak directly with teachers, the Director, or the Operational Manager.

We believe that open, respectful, and honest communication is best for all parties involved. You will always find an open door and an attentive ear at Swan River Montessori Charter School. We expect you to come directly to us with any concerns you have regarding your child's educational experience. We would rather address a problem/concern early, before it becomes a larger, more emotional issue.

Please be aware that we expect you to utilize the proper channels of communication. Issues should be addressed first with the child's teacher, even if the concern involves the teacher him or herself. The Director will become involved if either you or the teacher believes it is necessary and/or appropriate. The issue may be brought before the Board of Directors as deemed necessary by either you or the educational staff.

The Board of Directors (School Board) is responsible for the governance of the school. Board members are not to become individually involved with the daily management or operations of the charter school. In other words, Board members will not "micromanage" the school day but oversee and manage the governance and application of state and federal laws with regard to operating a public school.

School Board meetings are open to the public with published monthly meeting dates and times. If you would like to address the board you can request that your concern be placed on the agenda. Check the website or school bulletin board for meeting dates, times, and board minutes.

Inclement Weather

Swan River Montessori Charter School follows the decision of the Monticello School District with regard to weather-related closings due to our shared bus transportation. These decisions will be announced over the following stations:

- WCCO TV, Channel 4
- Swan River Facebook

****Important:** Swan River Montessori Charter School will not necessarily be listed on these radio or television stations. Please follow any announcement(s) made for Monticello School District #882.

Inspection of Property

Individuals entering the premises of Swan River Montessori Charter School, whether students, employees or guests, are expected to conduct themselves in keeping with established norms for personal conduct. In order to provide students and employees with a safe and healthy environment, Swan River Montessori Charter School reserves the right, at its sole discretion, to conduct inspections of students and visitors who are on school property. The personal possessions of students, employees, and guests may be searched whenever the school administration has reasonable suspicion that the search will uncover evidence of a violation of law or of school rules.

Inspections may include, but not limited to: 1) lockers/cubbies; 2) knapsacks, briefcases, lunch bags, gym bags or similar devices brought onto or existing on Swan River Montessori Charter School premises; and 3) clothing (with appropriate safeguards for the individual's personal privacy). As soon as practical after the search of a student's personal possessions, the school administration must provide notice of the search to the student, unless disclosure would impede an ongoing investigation by police or the school administration. See Policy 502, "Search of Student Lockers, Desks, Personal Possessions, and Student's Person", on the website, for further information.

Language Access

Swan River Montessori Charter School is committed to ensuring that all families have equal access to school information and services, no matter what language they speak at home. Free interpretation and translation services are available for parent meetings, school events, and important documents. Families can request help through the main office, their child's teacher, or by contacting the Director at director@swanrivermontessori.org. SRMCS Language Access Plan explains how Swan River Montessori Charter School supports students and families who speak a language other than English. The plan is available in the school office and on our website.

Library

Swan River Montessori Charter School does not have an on-site library. Classes may occasionally walk to the Monticello Public Library, where students have the opportunity to check out books. Families are responsible for books checked out by their student, including lost or damaged materials. If the Monticello Public Library assesses a fee for a lost or damaged book, Swan River will notify the family of the amount due. All fees are payable directly to Swan River Montessori Charter School.

Lockers

Students will be assigned a locker to store personal items, outdoor clothing/gear, and school-related supplies. All students are required to respect the property of others and of the school. All items should be properly stored within the confines of the locker and cubby and not left in the hallway (which is unsightly and a safety hazard). Younger children should have an extra change of clothing that remains in the locker for unforeseen accidents. Please replace this spare set of clothing if it has been utilized.

Valuables, especially electronics, should not be brought to school unless specific permission is granted. Please do not bring toys or games to school and note that no items of a violent nature will be permitted. We cannot assume responsibility for items brought from home. A Lost and Found is available at the school if your child misplaces any items. If necessary and with prior permission, the classroom teacher may safely store any valuables that must be brought to school in his/her classroom office. Swan River Montessori Charter School is not responsible or liable for lost or stolen items.

Pursuant to Minnesota statutes, school lockers are the property of the school district, and shall not be locked at any time. At no time does the school district relinquish its exclusive control of lockers provided for the convenience of students.

Please be aware that by use of a locker you agree to abide by the school policy Search of Student Lockers, Personal Possessions and Person's Self. This policy details the procedures regarding a search of lockers at Swan River Montessori Charter School. This policy is available in the main office as well as the school's web site.

Lost and Found

Each year, mittens, sweaters, hats, boots and lunch boxes are turned into the Lost and Found and are never claimed. Labeling your child's articles of clothing, boots and shoes with permanent ink is strongly recommended. If your child has lost items of clothing, please make an effort to check the Lost and Found. Items of higher value,

such as jewelry, may be held in the office. Unclaimed Lost and Found items will be donated periodically. The loss of an article of value should be reported to the classroom teacher or to the office.

Lunch

Hot Lunch: Swan River does offer a daily breakfast and hot lunch program. A meal calendar will be provided the month prior for sign up. All breakfast and hot lunches are transported to Swan River from a contracted catering company. All federal/state mandated nutrition guidelines are followed at all times. Swan River is monitored by the Department of Health and receives annual site visits to ensure compliance.

Cold Lunch: If you choose to provide your own lunch, please note that the State guidelines require that we insure children get a balanced meal, including a fruit, a vegetable, and a protein source. Please keep this in mind when preparing your child's lunch. The Montessori methodology of learning emphasizes practical life skills that children obtain as they progress through various developmental stages. One of these skills is proper nutrition; including the planning, preparation, and clean-up of a meal. We feel that each family should control what the child is eating, to reflect their own beliefs, dietary choices, and preferences. Similarly important, each family can also monitor how well the child is eating based on what comes back in his/her lunch box. Please DO NOT send any soda, juice, or other sugary beverage with your child for lunch. All students should have milk and/or water only during the school day unless there is a documented medical need for a different type of drink.

****Important: PLEASE LABEL YOUR CHILD'S LUNCH!**

Microwaves will be available for use. Please note that no food should take longer than two (2) minutes to warm up and should be brought to school in a container suitable for the microwave. Young children will be supervised and will have assistance in operating the microwaves.

Milk Program: If a student orders a hot lunch, a carton of milk is included with that lunch. Students have the choice of skim, 1%, or chocolate milk each day. If you wish for your child to only drink a certain type of milk offered at school, please let your child's teacher know.

Milk is also available for students who pack cold lunches. This must be indicated on the hot lunch order form.

Snacks: Swan River Montessori Charter School requires that any food intended to be shared with classmates and staff be commercially prepared. This policy follows state guidelines and is expressly concerned with homemade foods. It is not meant to limit the preparation of foods or treats related directly to the school curriculum.

Peanut Safe School: Peanut products of any kind (peanut butter, peanut butter cookies, granola bars with peanuts, etc.) are prohibited at all times. Our goal is to maintain a safe learning environment for everyone. If your child has any allergies to food and/or something in the classroom/school environment, be sure communicate this to your child's teacher immediately. Should any items containing peanuts or peanut products be found, a staff member will immediately confiscate it from the student, place it in a plastic baggie, and will return it at the end of the day to be taken home. A note or email may be sent home reminding the parent(s) of our Peanut Safe Policy.

Mandatory Reporting

Swan River Montessori Charter School staff members are mandatory reporters for the State of Minnesota for any suspected abuse or neglect of a child(ren). If abuse or neglect is in question, Child Protection Services will be notified immediately.

****Important:** The reporting staff member has NO obligation to communicate this notification to ANYONE, including the Director, Board of Directors, other staff members, or the parent/family in question, prior to the report being filed with CPS. This is a trained, mandated procedure.

Nondiscrimination

Swan River Montessori Charter School is committed to inclusive education and providing an equal educational opportunity for all students. Swan River Montessori Charter School does not discriminate on the basis of race, color, creed, religion, national origin, sex, marital status, parental status, status with regard to public assistance, disability, sexual orientation, including gender identity and expression, or age in its programs and activities. The school board has designated Annette Vemuri, Director, Swan River Montessori Charter School, 500 Maple Street, Monticello MN 55362, (763) 271-7926, director@swanrivermontessori.org as the district's human rights officer to handle inquiries regarding nondiscrimination.

Parent and Teacher Conferences

Parent/teacher conferences will be held two times per school year both in late fall and early spring. During these conferences, you and your child's teacher will discuss your child's progress in all areas of development. If either the teacher or a parent feels that additional conferences are needed, those requests will be honored at a time agreed upon between the parent(s) and the teacher. The Director of Swan River may participate in these special conferences if requested by a parent, the teacher, or the Director. The staff of Swan River feels strongly about open communication and is eager to assist you and your child in any way possible.

Parent Volunteers

Swan River Montessori Charter School encourages volunteerism throughout the school year, with the exception of the first 6 weeks of each school year. These first many weeks are when all students are in what Montessorians refer to as the "normalization period." This period allows students to fully engage in all aspects of the classroom without distraction and is critical to a well-functioning, successful school year.

Parents/guardians are welcome in the school and are encouraged to volunteer in their children's classrooms. To volunteer in the school building or classroom, parents/guardians should contact their child's teacher. Parents/guardians who visit the school should sign in at the front office before entering a classroom. Those volunteering in a Children's House classroom may need to complete a Department of Human Services background check. Other volunteers will need to complete the MN Bureau of Criminal Apprehension background check every two years. For more information, contact the front office.

****ALL visitors/volunteers/non-employees must sign in and out in the main office for any and all visits.**

Payments

Children's House tuition, Extended Care fees, snack fees, supply fees and any other payments can be paid through JMC, in person, or mailed. Your child may deliver a payment to the office provided it is in an envelope marked with your family's name and the purpose for the payment. When writing a check, please make it payable to Swan River Montessori Charter School and write the purpose of the check on the comment line.

Full tuition and extended care payments is due on or by the 1st day of each month, unless prior arrangements have been made. Swan River Montessori Charter School reserves the right to assess a 10% charge on any past due balances. Any payment more than one month late, may result in the disenrollment of the child from the program. The Board of Directors reserves the right to pursue legal means to secure payments on delinquent accounts and further reserves the right to include any collection costs and attorney fees in the unpaid balance.

Should your family experience unusual and/or unpredictable financial hardship, please consult with the School Director as soon as possible. It is the Board of Directors policy to make every effort to assist families to make arrangements for payments.

Non-Sufficient Funds Checks

Swan River Montessori Charter School will charge a handling fee of \$30 for the processing of any check returned to us because of insufficient funds. Upon receipt of a second NSF check, all future payments must be made with cash, cashier's check, or money order.

Termination and Notice Procedures

Swan River Montessori Charter School requires a two weeks written notice of termination after the initial 45-day trial period in Children's house. Swan River Montessori Charter School requires a two-week written notice of termination of extended care contract. You will be responsible for payment of tuition and extended care charges for those two weeks whether your child continues to attend during that time.

Placement of Students

Swan River Montessori Charter School makes every effort to accommodate parent requests for teachers or classroom placement; however, specific placements cannot be guaranteed. Parents who would like to request a particular teacher or classroom placement for the following school year must email the School Director at director@swanrivermontessori.org prior to June 1. Requests will be considered based on the individual needs of the student and the needs and balance of each classroom. Final placement decisions are made by the school.

Pledge of Allegiance

The Pledge of Allegiance may from time to time be recited in the classroom under the guidance of a teacher and/or support staff, as appropriate for the Montessori curriculum.

Anyone who does not wish to participate in reciting the Pledge of Allegiance for any personal reasons may elect not to do so. Students and school personnel must respect another person's right to make that choice.

The Pledge of Allegiance policy provides more detail regarding the recitation of the Pledge of Allegiance while at school. The policy is available in the main office and on the school's web site.

Recess (Playground) & Physical Education

Daily activity is very important for children and is planned whenever possible. It is our policy that if a child is well enough to come to school, s/he is well enough to play outdoors and fully participate in P.E. classes. Please supply appropriate clothing and shoes/boots for your child at all times. A staff member may contact you if your child is not prepared appropriately on a regular basis. Please remember to label your children's belongings.

Students will go outside and participate in physical education classes with the exception of the following:

- Rainy Weather – Students will be supervised in their classrooms or may go to the Gathering Space or Community Center for gross motor activities.
- Extreme Cold Weather - A wind-chill factor ("feels like" temperatures) of 10 below zero or colder.
- Medical Excuse - Students who have, or are recovering from, a significant medical issue will need a note from a licensed medical physician if they are to stay indoors at recess time.

****Important:** A parent/guardian may not supersede this policy and ask or insist his/her child remain indoors during recess and/or not participate in P.E. for any reason unless a medical excuse is provided as stated above. Again, it is our policy that if a child is well enough to come to school, s/he is well enough to play outdoors and fully participate in P.E. classes.

Reporting Absences

When a child is absent from school, please call the school office (763-271-7926) between 7:00-8:00 a.m. and state the reason for the absence. Parents or guardians may also leave a message on the school's voice mail or email Attendance at attendanced@swanrivermontessori.org to report a child's absence. If the school is not notified, attendance personnel will contact the parent/guardian at home or at work to confirm the absence and inquire about the reason. If no one is reached, the student will be marked unexcused. For detailed information, see Policy 503, "Student Attendance" (Appendix F).

School Communication

School news, announcements, and other paper communications will be sent home in Thursday folders. Weekly newsletters and important school information will be sent electronically, with important information also posted on the Swan River Montessori Charter School website. Some school-wide materials may be sent home with only the youngest child in each family to avoid duplication. Families are encouraged to regularly review Thursday folders and electronic communications to stay informed about school events, activities, and updates.

Section 504 Coordinator

Section 504 Coordinator Each year, Swan River designates a 504 coordinator. The Swan River board of Directors designated Annette Vemuri, Director, the 504 coordinator beginning July 1, 2026.

Contact information: Annette Vemuri
500 Maple Street,
Monticello, MN 55462
763- 271-7926

The Coordinator is responsible for all Section 504 matters pertaining to identification, evaluation and placement as well as disability discrimination.

What is Section 504?

Section 504 is a federal anti-discrimination law that protects the rights of individuals with disabilities in programs and activities that receive federal financial assistance from the US Department of Education. Recipients of this federal financial assistance include public school districts, institutions of higher education and other state and local agencies. It requires a school district to provide a “free and appropriate education, (FAPE) to each qualified student with a disability who is in the recipient’s jurisdiction, regardless of the nature or severity of the student’s disability.” Under Section 504, FAPE provides regular or special education and related aids and services that are designed to meet the needs of individuals with disabilities as adequately as the needs of individuals without disabilities are met.

Student Records

Student records are classified as public, private, or confidential. State and federal laws protect student records from unauthorized inspection or use and provide parents/guardians with certain rights. A permanent record for each student is kept on file in the school office. The records include the following information: progress reports, results of standardized tests, behavior and attendance records. A separate health record containing immunizations and screening reports is also kept on file for each student. A conference to review your child’s file may be arranged by contacting the Director. For more information on the rights of parents/guardians regarding student records, see “Student Records” (Appendix D). A complete copy of the Swan River Montessori Charter School’s Policy 515, “Protection and Privacy of Pupil Records”, may be viewed on the school website or obtained in the school office.

Student Surveys

Occasionally, Swan River Montessori Charter School utilizes surveys to obtain student opinions and information about students. For complete information on the rights of parents/guardians and eligible students about conducting surveys, a complete copy of Swan River Montessori Charter School’s Policy 520, “Student Surveys”, may be obtained on the Swan River website or from the front office.

Tuition and Extended Care Charges

Children's House monthly tuition and extended care payments are due on the last day of each month. Failure to pay past due amounts may result in the dismissal from Children's House or extended care services. Students may not be allowed to begin school in the fall until the previous year's account is current or payment arrangements have been made. Outstanding balances may also result in the inability to enroll future students.

Video and Audio Recording

School Buses

All school buses used by Monticello Public Schools may be equipped for the placement and operation of a video camera. Swan River Montessori Charter School will post a notice in a conspicuous location informing students that their conversations or actions may be recorded. Swan River Montessori Charter School and Monticello Public Schools may use a video recording of the actions of student passengers as evidence in any disciplinary action arising from the students' misconduct on the bus.

Places Other Than Buses

Swan River Montessori Charter School and grounds are equipped with video cameras. Video surveillance does occur, and may be used to aid any formal or informal investigations.

Withdrawals

The following applies to students who transfer from Swan River Montessori Charter School:

- 1) The school office should be notified in advance if parents are planning to transfer their child to a different school.
- 2) A Withdraw Form and Records Request form must be completed by the parent or guardian to allow the transfer of student records.
- 3) Official school records are not given to parents or guardians but are forwarded directly to the receiving school.
- 4) If Children's House tuition has been paid in full and the child transfers, a pro-rated refund will be given.

Yearbook

A yearbook is created annually and is available for purchase by families. Parents/guardians may opt to have their student(s) left out of the yearbook by contacting the front office.

Academics

Assessments and Testing

Students are assessed regularly to monitor progress and meet state requirements. FastBridge assessments are administered three times each year as part of our internal progress monitoring. In addition, students in grades 3–6 participate in the Minnesota background Comprehensive Assessments (MCA), which are state-mandated and administered each spring. Parents will receive individual MCA results when they are released by the Minnesota Department of Education.

Other educational data will be collected from students in the form of assignments, reports, assessments, and/or projects. This data will be used to assess each individual's progress throughout the school year. Swan River Montessori Charter School authorizes its teachers, administrators, support staff, counselors, and other educational professionals to receive and review this data only on an “as needed basis.” Student records are stored and locked in the main office. To opt out of state testing, please review and fill out the form in Appendix E. Additional information on testing can be found in Swan River's school website.

Curriculum Concern

The process for addressing a curriculum concern is as follows:

1. In a timely manner, contact the classroom teacher to review the course or unit outcomes and accompanying instructional resources. Discuss areas of concern to seek clarification.
2. If concerns persist, contact the Director. If necessary, the classroom teacher and Director of School may work together to make reasonable arrangements for alternative instruction. The Director may be brought into the discussion at any time.
3. If the concern is still not addressed to your satisfaction, parents should contact a School Board representative. Contact information can be found on the school website.

Extended School Year Opportunities

Swan River Montessori Charter School provides extended school year opportunities to a student who is the subject of an Individualized Education Program (IEP) if the student's IEP team determines the services are necessary during a break in instruction in order to provide a free and appropriate public education. For more information on extended school year opportunities for students with an IEP, contact Annette Vemuri, Director, at director@swanrivermontessori.org or 763-271-7926.

Field Trips

Field trips utilize community resources to supplement the curriculum. All field trips will be chaperoned by teachers, staff members and parents. A Field Trip Information Form with a Parent Permission Statement will be distributed to students before each field trip. There may be a fee for field trips which helps defray entrance fees and/or transportation costs. Scholarships may be available for students when the fees for field trips create undue hardship for the family. Please contact the Director or office in this situation. If the permission slip is not returned by the due date, the student will not be permitted to attend the field trip.

All students are expected to take part in field trips. However, students who have demonstrated patterns of inappropriate behavior may be excluded from these experiences. A student may also forfeit field trip privileges if the student is so far behind in his/her studies that, in the judgment of teachers and administration, attending the field trip might have a detrimental effect on the student's academic achievement. Parents or guardians that accompany students on field trips are required to complete a Background Check.

Homework

Swan River Montessori Charter School expects that children will be fully engaged and actively enjoying the thrill of learning at school, including time for independent study. We respect your family time and do not feel that a great deal of that time should be spent on homework assignments. We do, however, highly recommend that all families read together on a regular basis. Mathematics can easily be incorporated into activities of daily living in such a way that your child learns practical life skills at the same time s/he is working on mathematics. These skills can even be practiced by playing games. We do not want these activities to be burdensome or loathsome, they should be engaging to the student.

Your child's teacher may assign occasional homework, but if you feel your child is overly frustrated or the family is spending an inordinate amount of time on homework assignments, please consult with your child's teacher.

Parent Right to Know

If a parent requests it, Swan River Montessori Charter School will provide information regarding the professional qualifications of his/her child's classroom teachers, including, at a minimum, the following:

1. whether the teacher has met state qualifications and licensing criteria for the grade levels and subject areas in which the teacher provides instruction;
2. whether the teacher is teaching under emergency or other provisional licensing status through which state qualification or licensing criteria have been waived;
3. whether the teacher is teaching in the field of discipline of the certification of the teacher;
4. whether the student is provided services by paraprofessionals and, if so, their qualifications.

In addition, the school district will provide parents with information as to the level of achievement of their child in each of the state academic assessments. Swan River Montessori Charter School will provide notice to parents if their child has been assigned to, or taught for four or more consecutive weeks by, a teacher who does not meet applicable State certification or licensure requirements at the grade level and subject area in which the teacher has been assigned.

Progress Reports

Swan River Montessori Charter School provides families with three formal progress reports each school year. Progress reports are provided at each of the two scheduled parent-teacher conferences and again at the end of the school year. Parents/guardians or teachers may request additional conferences at any time during the school year to discuss a student's progress, needs, or concerns.

RTI and MTSS

Swan River Montessori Charter School does not receive Title I funding; however, students who need additional academic or behavioral support are served through the school's Response to Intervention (RTI) and Multi-Tiered System of Supports (MTSS) programs. Student needs are identified through assessments, classroom performance, teacher observations, and other relevant data. Students may receive targeted interventions in areas such as reading, math, or behavior in addition to their regular classroom instruction. Student progress is monitored regularly, and supports are adjusted based on individual needs. The goal of RTI and MTSS is to provide early, appropriate support to help students succeed in the general education setting.

Special Education

Swan River Montessori Charter School has staff members licensed to provide special education and related services for those students who meet criteria and have special education needs. Parents and students are directly involved with the school and appropriate outside agency staff in the development of the special education program and the student's Individual Education Plan (IEP) for school-age children. Students are eligible for special education services until the IEP Team decides to terminate services. Students remain with their general education peers in the least restrictive environment (LRE) to the extent the IEP Team determines is appropriate. Special education program evaluation is accomplished through a single strategic plan to improve due process compliance and program results for students with disabilities.

Rules and Discipline

Animals on School Premises

Prior permission must be obtained from the classroom teacher before any animal, other than classroom pets, are allowed into the classrooms. The owner/handler must properly restrain all animals and be present throughout the duration of the animal's stay in the classroom.

Attendance and Tardiness

Regular and punctual attendance is important to student success at Swan River Montessori Charter School. Consistent attendance supports academic progress, classroom participation, positive relationships, and the development of responsibility and dependability. Students are expected to attend school each day and arrive on time unless they have a valid excuse. The school day begins at 7:50 a.m., and students arriving after 7:50 a.m. are considered tardy and must report to the school office. Families are responsible for notifying the school when their child will be absent or tardy. Excessive unexcused absences or tardiness will be addressed in accordance with the school's attendance procedures and applicable Minnesota law. Please refer to Board Policy 503, Student Attendance, available on the Swan River Montessori Charter School website or from the school office, for complete attendance requirements and procedures.

Bullying Prohibition

Swan River Montessori Charter School is committed to providing a safe, secure and respectful learning environment for all students. Acts of bullying, in any form, by either an individual student or a group of students, are prohibited on Swan River Montessori Charter School property, at school-related functions or activities, on school transportation, and by misuse of technology. For detailed information, please see Policy 514, “Bullying Prohibition” (Appendix G).

Buses - Conduct on School Buses and Consequences for Misbehavior

Riding the school bus is a privilege, not a right. Swan River Montessori Charter Schools and Monticello Public School’s (MPS) general student behavior rules are in effect for all students on school buses. MPS will not provide transportation for students whose transportation privileges have been revoked. MPS is committed to transporting students in a safe and orderly manner. To accomplish this, student riders are expected to follow MPS rules for waiting at a school bus stop and for riding on a school bus. While waiting for the bus or after being dropped off at a school bus stop, all students must comply with the following rules:

- Get to the bus stop five minutes before your scheduled pick up time. The school bus driver will not wait for late students.
- Respect the property of others while waiting at the bus stop.
- Keep your arms, legs, and belongings to yourself.
- Use appropriate language.
- Stay away from the street, road, or highway when waiting for the bus.
- Wait until the bus stops before approaching the bus.
- After getting off the bus, move away from the bus.
- If you must cross the street, always cross in front of the bus where the driver can see you. Wait for the driver to signal to you before crossing the street.
- No fighting, harassment, intimidation, or horseplay.
- No use of alcohol, tobacco, or drugs.

While riding a school bus, all riders must comply with the following rules:

- Always follow the driver’s directions.
- Remain seated facing forward while the bus is in motion.
- Talk quietly and use appropriate language.
- Keep all parts of your body inside the bus.
- Keep arms, legs, and belongings to yourself and out of the aisle.
- No fighting, harassment, intimidation, or horseplay.
- Do not throw any object.
- No eating, drinking, or use of alcohol, tobacco, or drugs.
- Do not bring any weapons or dangerous objects on the school bus.
- Do not damage the school bus.

Consequences for school bus/bus stop misconduct will be imposed by Swan River Montessori Charter School under administrative discipline procedures. All school bus/bus stop misconduct will be reported to Swan River Montessori School's Director. Serious misconduct may be reported to local law enforcement.

Cellphones

Swan River Montessori Charter serves students in grades K–6 and is committed to maintaining a safe, respectful, and focused learning environment. Students must keep personal electronic devices powered off and stored in their backpacks while on school property, unless specific permission has been granted by both the classroom teacher and the Executive Director. Personal devices may not be used for inappropriate activities such as bullying, cheating, harassment, or other misconduct. Devices used in violation of this policy may be searched (when reasonable suspicion exists) and/or confiscated in accordance with school procedures and state law. Misuse of devices will result in disciplinary action consistent with the SRMCS discipline policy. The Board Approved Student Cell Phone Policy details the policies and procedures regarding cell phone use and it is the expectation and requirement of the Board that each student and parent/guardian familiarizes him/herself with the policy. The policy is available in the school office as well as on the school's web site.

Computers/Internet Usage

Swan River Montessori Charter School has computer labs and/or students will have access to computers in their classroom. The internet and other computer skills will be taught as a life skill; to conduct research and properly communicate with others.

Internet access is a privilege, not a right. Computer and network storage areas and disks/drives will be treated in the same manner as school lockers. School officials may review files and communications to maintain system integrity and insure that users are engaging in responsible activities. Users should not expect that files stored on computers and disks/drives will be private. Any faculty member has, at his/her sole discretion, the right to terminate the privileges of a student who misuses any computer or electronic device such as iPads. Violations could result in disciplinary action.

Respect and proper use of educational resources are a large part of the goals and objectives for all students. Inappropriate activities on the network include, but are not limited to:

- Sending or displaying offensive messages or pictures
- Using profanity or obscene language
- Harassing, insulting or attacking others
- Damaging computers, network systems or software programs
- Violating copyright laws and software licensing and illegally obtaining material that belongs to others
- Trespassing in another person's folders, work or files
- Wasting limited resources or work time
- Using the network for financial or commercial gain
- Using another's password
- Obtaining network access through disguise or bypass of legitimate log on procedures.

The Board Approved Internet Acceptable Use & Safety Policy details the policies and procedures regarding internet use in full and it is the expectation and requirement of the Board that each student and

parent/guardian familiarizes him/herself with the policy. The policy is available in the school office as well as on the school’s web site.

Discipline & the Discipline Rubric

The chart on the following page list a number of typical school behaviors and describe the ways we have agreed upon to respond to these behaviors at school. In many ways the major categories listed on the next page happen every day in classrooms. It is a fairly common occurrence for some children to not follow directions, to jostle or push one another, to use inappropriate language or to bring something inappropriate (but not necessarily dangerous) to school. Our teachers use a wide range of approaches to respond to such occurrences depending on the needs of the individual child and the specific behavior(s).

For example, a teacher might respond to a student not following directions by making eye contact, standing closer to the student, moving the student to a different seat, talking with the student (immediately or at a later time), restricting some privileges, etc. Using his/her professional judgment about what might work best for the individual child, the classroom teacher will try to help the child learn to behave in ways which will help promote the student’s own learning and will enhance the learning environment for everyone in the classroom.

The consequences listed on the next page happen only after the classroom teacher has exhausted all internal classroom remedies, has determined that the behavior represents a serious concern, and the behavior rises to the level of offense as described in the “Behavior Infractions” column of the chart. As you can see, for each level of offense we have listed a number of possible consequences. The flexibility of having a number of possible responses to student behaviors will allow us to choose the response that, in our best judgment, will help each individual child learn appropriate behavior.

To see Swan River’s Harassment and Violence Prohibition Policy (aka Bullying Prohibition Policy), please see Attachment 1 of this handbook.

DISCIPLINE RUBRIC

BEHAVIOR INFRACTION	1 st Offense	2 nd Offense	3 rd Offense
FOLLOW DIRECTIONS Refusal to comply with adult request or school rules, defiance or rude behavior toward staff.	Level 1	Level 2	Level 3
BE READY TO LISTEN AND LEARN Significantly disrupts teaching and learning.	Level 1	Level 2	Level 3
USE SCHOOL APPROPRIATE LANGUAGE Vulgarity, profanity, name calling, disrespectful comments and/or gestures.	Level 1	Level 2	Level 3
KEEP HANDS, FEET AND OBJECT TO YOURSELF Pushing, poking, slapping, shoving, grabbing, spitting, throwing objects and/or any other unwelcome contact.	Level 1	Level 2	Level 3
RESPECT PROPERTY Misuse/abuse of personal or school property.	Level 1	Level 2	Level 3
INAPPROPRIATE OBJECTS	Level 1	Level 2	Level 3
SEVERE BEHAVIOR INFRACTIONS (Incident Reports filed for all offenses)	1 st Offense	2 nd Offense	3 rd Offense
FIGHTING/ASSAULT Physical aggression with intent to harm.	Level 3	Level 4	Level 5
SEVERE DEFIANCE Refusal to comply with adult request resulting is unsafe circumstances.	Level 3	Level 4	Level 5
HARASSMENT/THREATS Any act of harassment, including sexual, racial, religious harassment, repeated unwelcome teasing, bullying or threats.	Level 3	Level 4	Level 5
DESTRUCTION/THEFT/VANDALISM	Level 3	Level 4	Level 5
WEAPONS	Level 4 or 5	Level 5	

Possible Consequences

LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5
- Note home - Phone call home - Office notification - Temporary move to office - Temporary move to another classroom - Loss of 1 recess - Stop/Think form 1 Lunch detention	- Mandatory: - Office notification - Home contact - Parent conference - Office visit - Observation by another teacher - Loss of 1+ recesses 1+ Lunch detentions - Restitution	- Mandatory: - Office visit - Home contact - Parent conference - Behavior contract - Referral to Child Find Team, if applicable - Restitution - In-school suspension - Out-school suspension	- Mandatory: - Office visit - Home contact - Parent conference - Restitution - Student sent home immediately - In-School suspension - Out-School suspension - Police notification	When deemed necessary, expulsion may be pursued within the guidelines of the Pupil Fair Dismissal Act of 1974, as amended.

**SRMCS reserves the right to skip or insert steps when deemed appropriate to have the consequence meet the nature of the offense.

DISCIPLINARY ACTIONS

1st Offense: Parents will be notified via email or phone call that their student has a dress code violation.

2nd Offense: An official letter of dress code will be sent to parents. This letter will require the parent signature acknowledging the following:

- That the second offense occurred.
- The parent(s) understands the SRMCS Dress Code in its entirety.
- The parent(s) understands the possible consequence should a third offense occur.

3rd Offense: The behavior will be considered insubordination and will be subject to consequences as outlined in the school's *Discipline Rubric*. When situations arise that are not specifically covered in this policy, administration will interpret the situation in light of the spirit and/or intent of this policy.

Possible disciplinary actions include but not limited to the following:

- All consequences as listed above
- Office visit
- Parent phone call
- Loss of one or more recess periods
- One or more lunch detentions
- Parent conferences
- In-school suspension
- Out-of-school suspension
- Student sent home immediately

Dress Code and Weather Gear Guidelines

Shoes: Many children prefer to do their schoolwork on the floor. To assist with keeping the classrooms clean and sanitary please adhere to the following requirements:

- All students need to have a second pair of shoes reserved for indoor classroom use only.
- Students need to have shoes for gym class when applicable.
- Students need to have weather appropriate shoes (*boots and socks for winter month versus sandals/flip flops*).

Clothing: It is the responsibility of both the parent(s) and the student to ensure the following clothing requirements are met at all times:

Any clothing or attire that is distracting is not permitted. This includes, but is not limited to:

- Clothing that reveals too much skin, hats/caps, and headwear.
- Clothing must cover the belly button/stomach/mid-section, shoulders, back and chest/cleavage.
- All clothing must be weather appropriate (*shorts, tank tops, flip flops are not permitted when snowing, etc.*)
- Shorts, skirts, and dresses must provide appropriate coverage for normal school activities, including sitting, bending, playing, and participating in physical education or recess. Clothing must cover the buttocks and private areas at all times.
- Undergarments must be covered at all times.
- Inappropriate and/or obscene references and/or communicated by or on clothing or attire are prohibited. This includes but not limited to the following: illegal substances, drugs, alcoholic beverages, tobacco, sexual innuendos, abuse, discrimination, war-like depictions (tanks, guns and other weapons), or any other inappropriate topics.
- Outerwear, such as jackets or coats will be stored in student's locker.
- Wearing attire that prevents the identification of students such as masks, face paint, disguises, or grooming is prohibited.
- Young children must dress appropriately so they may use the restroom without difficulty.

Cold Weather Clothing/Winter Gear: It is the responsibility of both the parent(s) and the student to ensure all cold weather clothing/winter gear requirements are met at all times. All students participate in outdoor activities daily throughout the winter unless the temperature reaches below -10 degrees Fahrenheit with wind chill i.e. "feels like" temperatures.

Below is a list of outdoor winter gear that are required to be at school for every student every day the temperatures fall below 40 degrees Fahrenheit. It is at the discretion of the child's teacher and/or the School Director whether or not certain winter items are (or are not) required to be worn outside during the school day and extended care on a day-to-day basis.

Required Winter Gear:

- Snow boots
- Snow pants
- Heavy winter coat
- Gloves/mittens
- Thick winter hat that covers both ears

Optional (but encouraged!) Winter Gear:

- Scarf

- Sweater/sweatshirt (for an addition layer and/or for use indoors)
- Extra pair of socks

Swimwear: It is the responsibility of both parents and students to ensure the following swimwear requirements are met at all times.

- The use of one piece swim suits or swim shirts are encouraged.
- Long tankinis are permitted with **no more** than two inches of stomach/mid-section exposure.
- All swim bottoms must be modest. Thongs, string bikinis, etc. are not permitted.
- Male swim shorts/trunks must be long enough to extend beyond the student's fingertips when arms are relaxed at his sides.
- Bikinis are not permitted.

All offenses or incidents where swimwear is deemed inappropriate by the School Director or staff, student will be provided with a T-shirt that must be cleaned and promptly returned to school. All incidents will be documented.

Drug-Free School Environment

Swan River Montessori Charter School has a “zero tolerance” drug, tobacco (including E-cigarettes, vapors, and any other similar substances and devices), and alcohol policy. The entire SRMCS campus is drug, tobacco, and alcohol free. This includes all school buildings, the playground and any other outdoor play spaces, the community center, and the library. It also applies to any school-sponsored field trips, events, and functions. State law declares the area surrounding a school as a tobacco, alcohol, drug and weapon free zone.

There are three primary school policies regarding substance use/abuse – Chemical Use & Abuse Policy, Drug Free Workplace & Drug Free School Policy, and Tobacco Free Environment Policy. These policies are available in the main office as well as on the school's web site.

Electronics

Electronic devices such as cellular phones, iPods, iPads, laser pointers, radios, walkie-talkies, electronic games, etc. are not allowed for any reason unless specific permission is granted by a staff member. All students are asked to keep these devices at home. Staff will place these items in the office if found. They may be picked up at the end of the day or be given to a parent. The school is not liable for electronic or any other item(s) inappropriately brought to school and subsequently broken or stolen.

****Parents/guardians may NOT undermine this policy by granting their child permission to bring/use these types of items at school, particularly cellular phones.**

Harassment

It is the policy of the school district to maintain a learning and working environment that is free from religious, racial or sexual harassment and violence. Swan River Montessori Charter School prohibits any form of religious, racial or sexual harassment or violence.

Everyone at Swan River Montessori Charter School has the right to feel respected and safe. Harassment towards staff or students will not be tolerated. Harassment may include abusive/threatening/intimidating/profane/obscene language or actions toward others. Harassment can be in written, oral, or in electronic form, or displayed through gestures, stalking, unwanted or unpleasant touching, or other inappropriate actions. Harassment may include the following when related to religion, race, sex or gender:

- Name calling, jokes, teasing or rumors
- Inappropriate comments on or unwelcome touching of another person
- Graffiti
- Notes or cartoons done “in poor taste”
- Offensive or graphic pictures, posters, or book covers
- Displaying private body parts to another
- Obscene gestures imitating or implying sexual content

Appropriate conflict resolution techniques will be emphasized and taught at Swan River Montessori Charter School. Please inform your child that if these techniques are not effective and s/he is being made to feel uncomfortable, fearful, or being “picked on,” the classroom teacher should be alerted. We take all reports of religious, racial, sexual harassment, or any type of bullying or violence VERY seriously. Administration will take all appropriate actions based on your report and any history obtained from witnesses. Your right to privacy will be respected to the furthest degree possible.

To see Swan River’s Harassment and Violence Prohibition Policy (aka Bullying Prohibition Policy) in full, please refer to Attachment 1 of this handbook.

Hazing

“Hazing” is defined as committing an act against a student or coercing a student into committing an act that creates a substantial risk of harm to a person, in order for the student to be initiated into or affiliated with a student organization, or for any other purpose.

Swan River Montessori Charter School strives to maintain a safe learning environment for students and staff that is free from hazing. Hazing activities of any type are inconsistent with the educational goals of Swan River Montessori Charter School and are prohibited at all times.

Students, teachers, administrators, volunteers, contractors, or other employees of Swan River Montessori Charter School shall not permit, condone, or tolerate hazing. This policy applies to behavior that occurs on or off school property, before, during and after school hours. A person who engages in an act that violates the school hazing policy or other law in order to be initiated into or affiliated with a student organization shall be subject to appropriate disciplinary action.

Any person who has knowledge of a violation of this policy or has been the victim of hazing should report the alleged acts immediately to school and/or law enforcement officials. Upon receipt of a complaint or report of hazing, Swan River Montessori Charter School shall undertake or authorize an investigation and may take immediate steps to protect the complainant, reporter, or others pending the completion of an investigation of hazing. Upon completion of the investigation, the school will take appropriate action, including any of the following: warning, suspension, exclusion, expulsion, student transfer, remediation, termination, or discharge.

Skateboard/Rollerblades

Skateboards and rollerblades may not be brought to school due to storage and safety reasons. The wheels that fit into Heelies may not be brought to school.

Tobacco-Free Schools; Possession and Use of Tobacco, Tobacco-Related Devices, and Electronic Delivery Devices; Vaping Awareness and Prevention Instruction

Swan River Montessori Charter School students and staff have the right to learn and work in an environment that is tobacco free. School policy is violated by any individual's use of tobacco, tobacco-related devices, or carrying or using activated electronic delivery devices in Swan River Montessori Charter School, on school grounds, in any school-owned vehicles, or at any school events or activities. Students may not possess any type of tobacco, tobacco-related devices, or electronic delivery devices in Swan River Montessori Charter School, on school grounds, in any school-owned vehicles, or at any school events or activities. Any student who violates this policy is subject to Swan River Montessori Charter School discipline. For detailed information on Swan River Montessori Charter School's Policy 419, "Tobacco-Free Environment; Possession and Use of Tobacco, Tobacco-Related 32 Devices, and Electronic Delivery Devices; Vaping Awareness and

Prevention Instruction”, see Appendix J. Contact the Director if you have questions or wish to report violations.

[Note: Specific exceptions to the tobacco prohibition are set out in “Tobacco-Free Environment; Possession and Use of Tobacco, Tobacco-Related Devices, and E

Vandalism

Vandalism of any Swan River Montessori Charter School property is prohibited. Violators will be disciplined and may be reported to law enforcement officials.

Weapons

Swan River Montessori Charter School has adopted a “zero tolerance” weapons policy. No student or nonstudent, including adults and visitors, shall possess, use, or distribute a weapon when in a school location except as provided in Swan River’s Weapons Policy (available in the school’s main office and on the school’s web site). The school will act to enforce this policy and to discipline or take appropriate action against any student, teacher, administrator, school employee, volunteer, or member of the public who violates this policy.

Health and Safety

Access to the School during School Hours

The school building will be locked and protected by a monitored security system during the school day. This is for the safety of all students and staff. No child will be released to any person(s) not listed on the emergency contact form unless consent is given by a parent prior to pick-up. A staff member will call you if there are any questions about the release of a child. It is the responsibility of the parents to keep the emergency contact form up-to-date and accurate. A government issued Photo ID is required for any unknown persons before the child is released. Visitors are welcome but must sign in via the main office before entering the classrooms. All family codes are disabled over breaks and summer vacation.

Accidents

All student injuries that occur at school, at school-sponsored activities, or on school transportation should be reported to the front office. Parents/guardians of an injured student will

be notified as soon as possible. If the student requires immediate medical attention, staff will call 911 or seek emergency medical treatment and then contact the parent(s).

Background Checks for Volunteers

Swan River Montessori Charter School values and appreciates the involvement of volunteers in our school community. To help maintain a safe environment for all students, volunteers who work with or have access to students may be required to complete a background check before volunteering. Volunteers must follow all school procedures and receive approval before participating in classroom activities, field trips, or other school-sponsored activities.

Background Checks for Volunteers and Board Members: Per SRMCS policy, every person (parents, grandparents, board members, etc.) 18 years of age and older who wishes to have any contact with students during the school day (field trips, classroom parties, classroom volunteering, board activities, or any other school-related interaction with students) MUST have a background check completed and on file in our main office

Please note that SRMCS does not see any of the information provided for the background check. Rather, Swan River receives a report stating whether or not the applicant has received clearance. It is strongly encouraged that all potential volunteers complete this process right away. Should an applicant try to complete a background check last minute to attend a field trip, for example, the report may not be received in time and under no circumstances will this policy be bent or broken. Once a background check is approved and on file, you may coordinate volunteer time with your child's teacher at any time.

****ALL visitors/volunteers/non-employees must sign in and out in the main office for any and all visits.**

Criminal History Background Checks

In accordance with Minnesota Statutes 123B.03 Subd. 1(e) Swan River Montessori Charter School Notifies parents and guardians that the school requires criminal history background checks on employees and on other individuals who provide services to the school.

Positions subject to criminal history background checks include, but are not limited to:

- Licensed teachers and instructional staff
- Paraprofessionals and educational assistants
- Administrators and office staff
- Extended care staff

- Coaches, advisors and activity leaders
- Substitute teachers and temporary staff
- Contractors, consultants and service providers who may have direct contact with students
- Volunteers and chaperones who supervise or regularly interact with students

The school's hiring authority retains discretion, as permitted by law, to determine whether a criminal history background check is required for other individuals providing services to the school based on the nature of the position, the individual's access to students, and the level of supervision involved.

Background checks are conducted in accordance with applicable Minnesota law and school policy to help maintain a safe learning environment for all students.

Crisis Management

Swan River Montessori Charter School has a "Crisis Management" policy. The "Crisis Management" policy addresses a range of potential crisis situations.

Each year, the school conducts various drills for the safety of both staff and students. We are required to conduct several (5) fire drills, lockdown drills (5) and severe weather drills (1) during the course of the year. We also have, as part of our school crisis plan, several procedures in case of a bomb threat, intruder inside our school and for an intruder outside the school. In addition, we have a plan for the evacuation of our school in case of emergencies such as: toxic chemical spill, loss of heat in winter, gas leak or a power loss, among other unforeseen situations.

If staff and students evacuate the building, we will make sure that movement to and from the evacuation site is done in a safe and orderly manner. We will not conduct a drill in unsatisfactory weather. Each of these drills will provide our staff and students the opportunity to become proficient with these necessary procedures. If you have questions, please contact the school office.

If an emergency event occurs and students are not able to return to the school building, the school will inform parents or guardians where their children have been taken for shelter via email. Our designated parent rally point is Monticello Community Center at 505 Walnut St, Monticello MN 55362. Enforcement will message reunification procedures to parents. A copy of Policy 806, "Crisis Management Policy", and our Emergency Plan, is available in the office and on the website.

Fire, Tornado & Severe Weather Safety and Nuclear Emergency

Fire:

Swan River Montessori will take all precautions to prevent fires from occurring. The school will hold five fire drills annually. Each room has a posted primary and secondary evacuation route as well as emergency phone numbers at all times. The staff is trained in building evacuation procedures yearly.

Lockdown

Lockdown Drill Procedures: Swan River Montessori Charter School will conduct lockdown drills during the school year in accordance with Minnesota state safety requirements. These drills are designed to help students and staff practice emergency response procedures in the event of a potential threat within or near the school building. During lockdown drills, students are expected to follow staff directions promptly and remain quiet and calm until the drill has concluded. Staff will review procedures with students in an age-appropriate and supportive manner to promote preparedness and safety.

Nuclear Emergency

In the event of a nuclear emergency, students and staff will be transported via school buses to Maple Grove Senior High School, 9800 Fernbrook Lane, Maple Grove, MN. Students or staff will not be allowed to make phone calls as lines must be kept open for emergency communications only. All regularly employed staff members will take a class roster, evacuate with students, and remain with them at Maple Grove Senior High School until they are picked up by a parent/guardian/designee. Staff will carefully monitor/track that all students are accounted for at all times.

Tornado/Severe Weather

The school has designated severe weather shelter areas to be used in case of a tornado warning. The staff will have a radio and flashlight for use in these emergencies. The school will conduct at least one tornado drill during the months of April through June. If there is a warning, staff will take the children to the designated severe weather area.

Health Information

Emergency Information

The safety and well-being of each student is a priority at Swan River Montessori Charter School. Parents/guardians must provide current emergency information at the time of enrollment or by the first day of school. This information should include current contact information, emergency contacts, and important health information, including allergies and medications. Parents/guardians are responsible for notifying the school promptly of any changes to this information throughout the school year.

First Aid

The school is equipped to handle minor injuries requiring first aid. Assistance can be sought in the front office. If a student experiences a more serious medical emergency at school, 911 will be called and/or a parent/guardian will be contacted depending on the situation. Swan River Montessori Charter School has installed an automated external defibrillator (AED). Tampering with the AED is prohibited and may result in discipline.

Illness

It is often difficult to know when your child is too ill to attend school. Please be mindful that most infections (including viral infections) are contagious to one degree or another. When making decisions regarding whether to send your child to school, please be respectful of your child's classmates and school staff by attempting to minimize the spread of germs. The following illnesses/conditions are typically the most common in a school environment. If your child's symptoms meet any of the following thresholds, s/he must remain at home:

- An underarm temperature of >100 degrees Fahrenheit, BEFORE fever-reducing medication is given. Your child must be free of fever for 24 hours WITHOUT medication before returning to school.
- Vomiting or diarrhea within the past 24 hours. The child should be able to eat fairly well before returning to school.
- Undetermined rash of which the source is unknown.
- Difficulty breathing or is experiencing any type of respiratory distress.
- Students with a communicable condition, including head lice, ringworm, shingles, or scabies, may be excluded from school when the condition poses a risk of transmission to others. Exclusion and return-to-school decisions will follow current Minnesota Department of Health guidance. The school may contact the student's parent or guardian and request appropriate treatment or medical guidance when necessary.
- A sore or discharging ear or eye (including, but not limited to, pink eye).

- Bacterial infection such as streptococcal (strep throat) or impetigo that has not been treated and is contagious to others.
- Untreated chicken pox or shingles. In the case of chicken pox, all lesions must be scabbed over and dry before returning to school.
- Continual runny nose, sore throat, and/or severe cough, with or without fever, at the teacher and/or School Director's discretion.
- Any contagious disease or illness. For any illness requiring antibiotics, the child must have had a full 24 hours of antibiotic treatment before returning to school.

If a parent is in doubt about sending a child to school, please call the school first to discuss the situation. We are happy to assist you.

****Important:** Swan River Montessori Charter School staff will follow the same guidelines to determine if your child is sick while at school. Please note that the school does not employ a nurse to assess or care for your child during the school day.

If your child experiences any of the previous ailments, a staff member will contact a parent immediately. If no parent can be reached, emergency contacts will be used. It is the responsibility of the parent(s) to ensure the child is picked up promptly. The child will be isolated from the other students until he or she is picked up. Parents and/or emergency contacts **MUST** pick up an ill child within ONE HOUR of the initial phone call. It is the responsibility of the parent(s) to inform the school if a contagious illness is present within 24 hours of being sent home.

Staff will do their best to keep families informed about contagious illnesses reported in your child's classroom. The school will circulate a fact sheet about the illness so that you are aware of potential symptoms in your child.

If your child has a significant medical history that could result in physical or mental health concerns while at school (e.g. seizures, gastro-intestinal diseases, etc.), please be sure to have a direct conversation with your child's teacher and the School Director to ensure they are fully aware of these issues. Never assume that this information is fully disclosed in previous student records. An action plan should be devised and placed in your child's file so that staff can respond in the most appropriate fashion should your child experience difficulties during the day.

Immunizations

All students must have proof of immunization or appropriate documentation exempting them from such immunizations in order to enroll or remain enrolled. Students may be exempted from the immunization requirement when the immunization of the student is contraindicated for

medical reasons; laboratory confirmation of adequate immunity exists; or due to the conscientiously held beliefs of the parents/guardians or student. Swan River Montessori Charter School will maintain a file containing the immunization records for each student in attendance at the school district for at least five years after the student reaches the age of 18. For a copy of the immunization schedule or to obtain an exemption form or information, contact the front office.

Inhalers

Prescription asthma or reactive airway disease medications can be self-administered by a student with an asthma inhaler if:

- Swan River Montessori Charter School has received a written authorization each school year from the pupil's parent permitting the student to self-administer the medication, along with the ordering provider signature to self administer. Contact the front office for the Medication Authorization Form or go to the school website.
- The child is older than the 3rd grade and the operations manager has assessed the student's knowledge and skills to safely possess and use an asthma inhaler in a school setting and enters into the student's school health record a plan to implement safe possession and use of asthma inhalers if needed.
- The inhaler is properly labeled for that student.

Injury

If a student has been advised to limit or be excused from participation in physical education or other school related activities, a signed and dated medical excuse is required by a licensed doctor. A reinstatement permission slip from a doctor is also required before the student may again participate. This is to ensure the safety and physical well-being of the child.

Medication

Medication may be stored for and administered to a child at school only if the medication is in its original container, the label is clearly intact, and a Medication/Treatment Authorization Form has been completed and signed. No staff member will administer medication of any kind if these procedures have not been followed. The form must be given directly to a staff member, preferably the child's teacher or administration, so any questions may be answered thoroughly at that time.

The staff of Swan River considers any sprays, creams, ointments, etc. to be medication (e.g. bug spray, Benadryl/hydrocortisone). The proper form must be completed before these are applied to a child's skin. We strongly encourage that these items be applied prior to coming to school.

These items are not allowed to be kept in your child's back pack, locker, lunch box, cubby, etc. They must be given to and stored by either the child's teacher or the main office.

Over-the-counter lotions/sun screens are permitted and may be used with verbal/written parent permission at any time. The student is responsible for application and storage of any OTC lotions.

****Important:** ALL Swan River Montessori Charter School staff retain the right to refuse medication administration if they feel uncomfortable doing so for any reason.

Student Health Program and Information

The Swan River Montessori Charter School student health program follows state and local guidelines. To help your child succeed in school, please ensure that your child gets regular and adequate sleep, exercise, and a balanced diet.

When your child has contacted a communicable disease, please notify the school immediately. Such diseases include: Covid-19, AIDS, chicken pox, monkeypox, whooping cough, fifth's disease, lice, measles, meningitis, mumps and pink eye.

If your child has a fever of 100 degrees Fahrenheit or above, rash, diarrhea, vomiting, or a cough with a fever, please keep him/her home. Children who have been vomiting may not attend school for 24 hours. Children need to be fever-free for 24 hours (without the use of fever reducing medication) in order to return to school. If you do not have a thermometer at home, signs and symptoms that may indicate your child has a fever include chills, feeling very warm to the touch, having a flushed appearance, or sweating.

Strep throat must be treated with an antibiotic for 12 hours before your child returns to school. Often a day at home and bed rest will prevent more serious illness and encourage more rapid recovery.

A parent/guardian should notify the school if his/her child is unable to attend school because of illness. Contact the front office at 763-271-7926, or by emailing kirstenh@swanrivermontessori.org

Vision & hearing screening is done in the fall for K, 1st, 3rd, and 5th graders, and any new students. Any concerns are communicated with parents. A cooperative effort between parents and school health services helps promote good health for all students. Please do not hesitate to email the office at any time with your questions or information regarding your child's health.

Suicide Prevention Information

Protecting the health and well being of all students is of utmost importance. Contact information for suicide prevention and crisis helplines are below:

- 988 Suicide & Crisis Lifeline - 988
- Crisis Text line - Text HOME to 741741
- Minnesota Warmline: Call or text 844-739-6369

Lead Testing

Lead Testing Notification: Swan River Montessori Charter School maintains a Lead in Drinking Water Management Plan in accordance with Minnesota state requirements. Information regarding lead testing results, any remediation efforts undertaken by the school, and updates to the plan are available on the school's website. Parents and guardians may review this information at any time through the SRMCS website or request a copy through the main office. Testing information and remediation updates will be posted and updated as required by state law.

Pest Control Materials & Asbestos Notification

Pest Control

Our district utilizes a licensed, professional pest control service firm for the prevention and control of rodents, insects, and other pests in and around the school's building. Their program consists of:

1. *inspection and monitoring* to determine whether pests are present, and whether treatment is needed;
2. recommendations for *maintenance and sanitation* to help eliminate pests without the need for pest control materials;
3. utilization of *non-chemical measures* such as traps, caulking and screening; and
4. application of *EPA-registered pest control materials* when needed.

Pests can sting, bite, cause contamination, damage property, and spread disease; therefore, we must prevent and control them. The long-term health effects on children from the application of such pest control materials, or the class of materials to which they belong, may not be fully understood. All pest control materials are chosen and applied according to label directions per federal law.

An estimated schedule of interior pest control inspections and possible treatments is available for review in the school office. A similar estimated schedule is available for application of herbicides and other materials to school grounds. Parents of students may request to receive, at their expense, prior notification of any application of a pest control material, should such an application be deemed necessary on a day different from the days specified in the schedule.

Asbestos Notification

Like many buildings in the United States built before the hazards of asbestos were known, the historic church portion of SRMCS has some asbestos containing material. Due to the asbestos in that portion of the building, we have an asbestos inspection every three years. The asbestos material is located where it is not easily accessible to the public and presents no immediate threat.

The only known remaining asbestos materials are located in the following locations:

- Floor tile underneath the floor in former church building
- Vermiculite insulation in wall cavities and above ceiling in the former church building

The new part of our building is asbestos free.

Security

In order to keep the school building secure, all doors are locked during school hours. Please ring the doorbell at the front entrance to gain admittance. All visitors must check in at the school office.

Please note that SRMCS does not see any of the information provided for the background check. Rather, Swan River receives a report stating whether or not the applicant has received clearance. It is strongly encouraged that all potential volunteers complete this process right away. Should an applicant try to complete a background check last minute to attend a field trip, for example, the report may not be received in time and under no circumstances will this policy be bent or broken. Once a background check is approved and on file, you may coordinate volunteer time with your child's teacher at any time.

SRMCS CHILDREN'S HOUSE PROGRAM: PROCEDURES & POLICIES

To provide children with the best educational foundation possible, Swan River Montessori Charter School operates what is called Children's House, a non-profit early childhood program for children ages 3 through 5. This program is a private, tuition-based program and is not considered part of the charter school. Per state charter law, entrance into the Children's House Program cannot guarantee entrance into the charter school. If you have any questions about this policy, please contact the main office.

Trial Period

The first 45 days of a child's enrollment in the Children's House Program are considered a trial period. Within those 45 days either the school or the parents may choose to withdraw the child from the program and all tuition payments will be prorated. In order to maintain an authentic Montessori environment that will allow all children to be successful, we retain the right to withdraw any student at any time for any reason.

Payment

Full tuition payment is due on or by the 1st day of each month, unless prior arrangements have been made. Swan River Montessori Charter School reserves the right to assess a 10% charge on any past due balances. Any payment more than one month late, may result in the disenrollment of the child from the program. The Board of Directors reserves the right to pursue legal means to secure payments on delinquent accounts and further reserves the right to include any collection costs and attorney fees in the unpaid balance.

Should your family experience unusual and/or unpredictable financial hardship, please consult with the School Director as soon as possible. It is the Board of Directors policy to make every effort to assist families to make arrangements for payments.

Non-Sufficient Funds Checks

Swan River Montessori Charter School will charge a handling fee of \$30 for the processing of any check returned to us because of insufficient funds. Upon receipt of a second NSF check, all future payments must be made with cash, cashier's check, or money order.

Financial Assistance: SRMCS Scholarship Fund

Financial assistance is provided to families who meet income requirements. Applications are available in the school office and on the school's web site. Please consult the School Director as early as possible if you have any questions. All assistance information is kept confidential.

Termination and Notice Procedures

Swan River Montessori Charter School requires a two weeks written notice of termination after the initial 30 day trial period. You will be responsible for payment of tuition for those two weeks whether or not your child continues to attend during that time.

Toilet Training

Swan River Montessori Children's House Program only accepts children who are fully toilet trained and require no assistance in changing their clothes, including undergarments. Each Children's House classroom conveniently houses its own bathroom facility appropriately sized for children. We do understand that occasional accidents may occur and, therefore, request that a seasonally appropriate change of clothing be provided and left at the school for your child at all times. No child will be shamed or reprimanded when a toileting accident occurs. However, our teachers will call for a parent/teacher conference if continued accidents from any one child occur. The child may be asked to leave the school if the child is not deemed fully toilet-trained by the child's teacher and/or the School Director.

****Important:** Under NO circumstances, will any staff member assist a child with the cleaning/wiping of genital area(s).

SRMCS EXTENDED CARE PROGRAM: PROCEDURES & POLICIES

Contracts & Schedules

Enrollment in the Extended Care Program is completed via a contracted schedule. This contract is available on the school's web site or in the main office. The contract requires a set schedule of usage for AM and/or PM care. Payment for the contracted schedule is required whether or not your child is in attendance. If you desire to modify your schedule, even temporarily, please contact the main office.

RATES	Contract Rate	Drop-In Rate
Morning rate (7:00 – 7:35)	\$5.00	\$8.00
Afternoon rate (2:10 – 5:00)	\$15.00	\$20.00

There is no registration fee for the Extended Care Program.

Drop Off & Pick Up of Students

During all Extended Care times, parents are expected to park their vehicles and accompany their child to and from the Extended Care classroom through the chapel doors. The Extended Care

staff will not leave the Extended Care classroom at any time to assist in dropping off or picking up of a child. The children will remain under the supervision of the Extended Care staff until regular school classes begin or a designated adult arrives to pick up.

Emergency/Drop-In Care & Late Pick-Up

Families who normally do not utilize Extended Care, but have a special one-time need MUST make arrangements as far in advance as possible. Under these circumstances, we will try our best to accommodate your needs, but we cannot guarantee availability. A \$20 drop-in fee will be charged for these special arrangements.

Extended Care is open from 7:00 a.m. to 7:35 a.m. and 2:10 p.m. to 5:00 p.m. A late charge of \$10.00 for every 10 minutes, or any increment thereof, will be applied for any pick up after 5:00 p.m. This is a per student charge. Parents should call the school if a delay is inevitable.

Payment

Payment is due on or by the 1st of each month unless prior arrangements have been made. You will be billed according to your schedule as indicated on your contract for each month. If your extended care needs change, please contact the office to get another contract to fill out. Families are not charged for half days or any other days/times that school is not in session (winter break, teacher workshop days, etc.). There is a separate registration process for school days with early dismissal times. Two or more late payments may jeopardize your child's enrollment in the Extended Care Program.

Should your family experience unusual and unpredictable financial hardships, please consult with the School Director as soon as possible. It is the Board of Directors policy to make every effort to assist families to make arrangements for payments.

Non-Sufficient Funds Checks

Swan River Montessori Charter School will charge a handling fee of \$30 for the processing of any check returned to us because of insufficient funds. Upon receipt of a second NSF check, all future payments must be made with cash, cashier's check, or money order.

Swan River thanks you for taking the time to read through this handbook carefully. If you have any questions or would like to discuss a topic further, please contact the School Director at 763-271-7926 or by email at director@swanrivermontessori.org.

Swan River thanks you for taking the time to read through this handbook carefully. If you have any questions or would like to discuss a topic further, please contact the School Director at 763-271-7926 or by email at director@swanrivermontessori.org.

Appendix A – Calendar

Swan River Montessori Charter School District 4137

SRMCS 2026-2027

August '26

Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

September '26

Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

October '26

Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

November '26

Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

December '26

Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

January '27

Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

February '27

Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

March '27

Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

April '27

Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

May '27

Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

June '27

Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

July '27

Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Breaks/Events

September

1st Open House 4-6
2nd CH Phase in - 8- 9:30
3rd CH Phase in - 8- 10
7th Labor Day
8th First Day of School

October

15 & 16 No School
19th No School

November

6th No School
20th Parent/teacher Conferences
23rd & 24th No School
25th - 27th Thanksgiving Break

December

23rd - Jan 1 Winter Break

January

1st No School
18th No School
29th - No School

February

12th - Conferences
15th - No School

March

4th & 5th - No School
22nd - 29th - Spring Break

April

30th - no school

May

31st Memorial Day

June

3rd Last Day of School

Color Key

Teacher Workshop

No School

No School

No School

Full Day Conferences

No School

Conference Prep

No School

Board Approved

2.17.26

Color Key	
Teacher Workshop	No School
No School	No School
No School	No School
Full Day Conferences	No School
Conference Prep	No School
Board Approved	2.17.26

Appendix B – Incident Report

SRMCS : Incident Report Involving a Child

Directions: Please complete the incident report form within 30 minutes of the incident occurring. Reports should be given directly to Jessica Frederiksen or scanned to the email address jessicaf@swanrivermontessori.org. Do not provide a written description of the incident. A member of the administration will document the reporter's oral description of the incident.

Student's Name: _____ **Grade** _____

Student's Teacher _____ **Date and Time:** _____

Staff Member Reporting Incident: _____

☐ Witnessed by staff ☐ Reported by students

Location:

☐ General Ed. Classroom ☐ Hallway ☐ Main Office ☐ Gathering Space ☐ Bathroom
☐ Community Center ☐ EE/Art Room ☐ WIN Room ☐ Nature Playground ☐ Playground
☐ Lunch Room ☐ Music Room ☐ Other: _____

Behavior:

FOLLOW DIRECTIONS	BE READY TO LISTEN AND LEARN
☐ Refusal to comply with adult request ☐ Refusal to comply with school rule ☐ Defiance or rude behavior toward staff	☐ Significant disruption of teaching ☐ Significant disruption of learning
USE SCHOOL APPROPRIATE LANGUAGE	KEEP HANDS, FEET, AND OBJECTS TO YOURSELF
☐ Vulgarity or profanity ☐ Name calling ☐ Disrespectful comments and/or gestures	☐ Shoving, grabbing, slapping, spitting or biting ☐ Throwing objects at or towards staff or student ☐ Other unwelcome contact: _____
RESPECT PROPERTY	INAPPROPRIATE OBJECTS
☐ Misuse or abuse of personal property ☐ Misuse or abuse of school property	☐ Possession of inappropriate object(s): _____
FIGHTING/ASSAULT	SEVERE DEFIANCE
☐ Physical aggression with intent to harm resulting in injury ☐ Physical aggression with intent to harm did not result in injury	☐ Refusal to comply with adult request resulting in unsafe circumstances ☐ Elopement from school building or property ☐ Elopement from public property
HARASSMENT/THREATS	DESTRUCTION/THEFT/VANDALISM
☐ Sexual harrasment ☐ Racial harassment ☐ Religious harassment ☐ Repeated unwelcome teasing ☐ Threats to staff ☐ Threats to student	☐ Theft from student ☐ Theft from staff ☐ Vandalism

☐ Behavior observed is not indicated above (please describe below)

What was happening before the behavior occurred (antecedent)?

- | | | |
|--|---|---|
| ☐ Given direction from adult | ☐ Asked to wait | ☐ Activity/item denied (told no) |
| ☐ Given a non-preferred task/activity | ☐ Asked to transition activities | ☐ Loud, noisy environment |
| ☐ Given a preferred task/activity | ☐ Difficult task/activity | ☐ Given assistance/correction |
| ☐ Attention given to peers | ☐ Presence of a specific person | ☐ Planned ignoring |
| ☐ Social conflict or misperception | ☐ Unexpected event or change | ☐ Task involving handwriting |
| ☐ Task involving reading | ☐ Task involving math | ☐ Task involving multiple steps |
| ☐ Other (please describe): | | |

What was the consequence?

- | | | |
|---|--|---|
| ☐ Verbal redirection | ☐ Physical redirection/prompt | ☐ Ignored problem behavior |
| ☐ Continued redirection | ☐ Verbal reprimand | ☐ Removed activity |
| ☐ Removed from room | ☐ Given a different task/activity | ☐ Loss of reward or other preferred |
| ☐ Sensory break | ☐ Adult model of appropriate behavior | ☐ Brought to WIN room or SpEd case manager |
| ☐ Given choices | ☐ Given "First, Then" | ☐ Classroom teacher intervention |
| ☐ Brought to Special Education Coordinator | ☐ Physical restraint of student (please see note below) | |
| ☐ Brought to School Director | | |
| ☐ Given calming or other tool (please describe): | | |
| ☐ Other (please describe): | | |

Duration of behavior:

- | | | | |
|--------------------------------------|--|---|--|
| ☐ <1 minute | ☐ 1 - 5 minutes | ☐ 5 - 10 minutes | ☐ 10 - 30 minutes |
| ☐ .5 - 1 hour | ☐ 1-2 hours | ☐ 2-3 hours | ☐ 3+ hours |
| ☐ Other: | | | |

Intensity of behavior:

- | | | | |
|--|--|---|---|
| ☐ Very severe/intense (dangerous or significantly disruptive) | ☐ Pretty severe/intense (potentially dangerous or significantly disruptive) | ☐ Somewhat severe (causes problems but is not dangerous or significantly disruptive) | ☐ Not at all severe (inconvenient or mildly distracting) |
|--|--|---|---|

Physical findings (observed injury to student or staff, material damage, etc.):

- | | |
|---------------------------------------|-------------------------------|
| ☐ Description: | ☐ None |
|---------------------------------------|-------------------------------|

** SRMCS is not authorized to use physical restraint or holding of students unless in crisis situation where a staff member must hold a child immobile or limit a child's movement (body contact is the only source of physical restraint or immobilization) in order to effectively gain control of a child to protect the child or other person from injury. More information is available in the Main Office.

Appendix C – School Meals Policy

Swan River Montessori Charter School

Adopted: 1.17.08

MSBA/MASA Model Policy 534 Charter

Orig. 2022 (as Charter Policy)

Revised: 5.19.26

Rev. 2025

534 SCHOOL MEALS POLICY

I. PURPOSE

The purpose of this policy is to ensure that students receive healthy and nutritious meals through the charter school's nutrition program and that charter school employees, families, and students have a shared understanding of expectations regarding meal charges. The policy of the charter school is to provide meals to students in a respectful manner and to maintain the dignity of students by prohibiting lunch shaming or otherwise ostracizing the student. The policy seeks to allow students to receive the nutrition they need to stay focused during the school day and minimize identification of students with insufficient funds to pay for a la carte items or second meals as well as to maintain the financial integrity of the school nutrition program.

II. GENERAL STATEMENT OF POLICY

- A. Swan River Montessori Charter School (SRMCS) recognizes the parent/guardian's responsibility to provide nutritious meals for their children. Proper nutrition is essential for adequate learning to occur.
- B. It is the goal of SRMCS to provide nutritious meals to students to promote healthy eating habits and enhance learning as well as eliminate stigmatization of children who are unable to pay meal charges.
- C. It is the policy of SRMCS to offer lunches that meet state and federal guidelines.
- D. The Food Service Provider (FSP) strives to produce quality meals in a fiscally responsible manner.

- E, Families may apply for free/reduced-price meal benefits anytime during the school year. Meal applications are distributed to all families in the district prior to the student's first day of classes. In addition, applications are available on all scheduled school days in the school's main office.

III. PAYMENT OF MEALS

- A. *Students have use of a meal account. When the balance reaches zero, a student may charge no more than 10 meals. When an account reaches this limit, a student shall not be allowed to charge second meals or a la carte items until the negative account balance is paid.*
- B. Free School Meals Program
 - 1. The free school meals program is created within the Minnesota Department of Education.
 - 2. Each school that participates in the United States Department of Agriculture National School Lunch program and has an Identified Student Percentage at or above the federal percentage determined for all meals to be reimbursed at the free rate must participate in the federal Community Eligibility Provision in order to participate in the free school meals program.
 - 3. Each school that participates in the free school meals program must:
 - a. participate in the United States Department of Agriculture School Breakfast Program and the United States Department of Agriculture National School Lunch Program; and
 - b. provide to all students at no cost up to two (2) federally reimbursable meals per school day, with a maximum of one (1) free breakfast and one (1) free lunch.
 - c. A student who has been determined eligible for free and reduced-price meals must always be served a reimbursable meal even if the student has an outstanding debt.

- C. Once a meal has been placed on a student's tray or otherwise served to a student, the meal may not be subsequently withdrawn from the student by the cashier or other school official, whether or not the student has an outstanding meals balance.
- D. When a student has a negative account balance, the student will not be allowed to charge a snack item.
- E. If a parent or guardian chooses to send in one payment that is to be divided between sibling accounts, the parent or guardian must specify how the funds are to be distributed to the students' accounts. Funds may not be transferred between sibling accounts unless written permission is received from the parent or guardian.
- F. A student may purchase a second breakfast at the nonprogram price if the student has already selected a reimbursable breakfast.
- G. A student may purchase a second lunch at the nonprogram price if the student has already selected a reimbursable lunch.

[NOTE: New paragraphs F and G apply if a school receives school breakfast aid under Minnesota Statutes, section 124D.111 or school lunch aid under Minnesota Statutes, section 124D.111 respectively.]

IV. LOW OR NEGATIVE ACCOUNT BALANCES – NOTIFICATION

- A. The charter school will make reasonable efforts to notify families when meal account balances are low or fall below zero.
- B. Families will be notified of an outstanding negative balance.

- C. Reminders for payment of outstanding student meal balances will not demean or stigmatize any student participating in the school lunch program, including, but not limited to, dumping meals, withdrawing a meal that has been served, announcing or listing students' names publicly, providing alternative meals not specifically related to dietary needs; providing no reimbursable meals; or affixing stickers, stamps, or pins.

V. UNPAID MEAL CHARGES

- A. The charter school will make reasonable efforts to communicate with families to resolve the debt. Collection options may include, but are not limited to, use of collection agencies, claims in the conciliation court, or any other legal method permitted by law.
- B. The charter school will make reasonable efforts to collect unpaid meal charges classified as delinquent debt. Unpaid meal charges are designated as delinquent debt when payment is overdue, the debt is considered collectable, and efforts are being made to collect it.
- C. Negative balances of more than 10 meals not paid will be turned over to the executive director or executive director's designee for collection. In some instances, the charter school does use a collection agency to collect unpaid school meal debts after reasonable efforts first have been made by the charter school to collect the debt. Collection options may include, but are not limited to, use of collection agencies, claims in the conciliation court, or any other legal method permitted by law.
- D. The charter school may not enlist the assistance of non-charter school employees, such as volunteers, to engage in debt collection efforts.
- E. The charter school will not impose any other restriction prohibited under Minnesota Statutes, section 123B.37 due to unpaid student meal balances. The charter school will not limit a student's participation in any school activities, graduation ceremonies, field trips, athletics, activity clubs, or other extracurricular activities or access to materials, technology, or other items provided to students due to an unpaid student meal balance.

VI. DISSEMINATION AND REVIEW OF POLICY

- A. This policy will be disseminated to all enrolled SRMCS families annually before the start of each school year and to households transferring to SRMCS during the school year. It will also be disseminated to all school employees annually before the start of each school year and to newly-hired SRMCS employees during the school year. This policy is available on the SRMCS web site (www.swanrivermontessori.org) and in the school's main office.
- B. This policy and any pertinent supporting information shall be provided in writing (i.e., mail, email, back-to-school packet, student handbook, etc.) to:
1. all households at or before the start of each school year;
 2. students and families who transfer into the charter school, at the time of enrollment; and
 3. all charter school personnel who are responsible for enforcing this policy.
- C. The charter school will post this policy on the charter school's website, or the website of the organization where the meal is served, in addition to providing the required written notification described above.
- D. If the charter school contracts with a third party for its meal services, it will provide the vendor with its school meals policy. The charter school will ensure that any third-party provider with whom the charter school enters into either an original or modified contract after July 1, 2021, adheres to the charter school's school meals policy.
- E. This policy will be reviewed by the SRMCS Board of Directors at least bi-annually and as state and/or federal guidelines require it.

MEAL CHARGE PROCEDURES [NOTE: These procedures may not need to be in a policy]

PURCHASING AND PAYMENT PROCEDURES

Ordering of Meals

- All will receive a monthly lunch menu and order form to order meals.
- Meal orders and payment for all meals purchased are due by date stated on the order form.

- The Hot Lunch Coordinator tallies the number of meals ordered per day and submits those totals to the contracted catering company.
- The Hot Lunch Coordinator, or a designee, ensures that all milk provided to students is refrigerated at the mandated temperature and is within the date of expiration as indicated on individual cartons.

Forgotten Lunches

If a student forgets his/her lunch, SRMCS will provide a hot lunch, whenever possible. SRMCS contracts with a catering company and, therefore, must order meals a minimum of one week in advance. This may mean that a hot lunch is not available. In this case, the student will be offered a grain, protein, fruit/vegetable, and milk. The parent(s)/guardian(s) will be notified via written notice and/or email that the lunch has been provided and the charge for that lunch.

A charge for a forgotten lunch will cost the same amount as a standard ordered lunch.

Insufficient or Overdrawn Meal Accounts

All students will be provided a meal regardless of meal account status.

Students eligible for free/reduced-price meals will always be served a meal regardless of unpaid food service accounts.

“Cash In Hand” Payments

All meals must be pre-ordered from the contracted catering company a minimum of one week in advance. Therefore, SRMCS is unable to accept student “cash in hand” payments for meals. However, SRMCS does accept student “cash in hand” payments for milk (only).

Notification of Account Status

Written notification is provided on a monthly basis to individual families only if their meal account has a credit or a negative balance in any amount. If no written notification is provided, the family’s account status is current.

- Should a family receive a notice regarding their account status, the expectation is that the positive or negative balance be applied to the next month’s meal order payment.

- The Hot Lunch Coordinator, or designee, may contact individual families via email, telephone, or written notice to discuss account status and request payment. A second or third request for payment will be sent if the parent(s)/guardian(s) have not responded.
- Non-sufficient funds (NSF) checks will follow the school's NSF procedures as stated in the Parent Handbook.
- Families may contact the main office to request account balance information at any time.
- Notification methods may be different depending on individual/family circumstances.

Collectable Meal Debt See Articles IV and V above

- When payment is overdue, the debt is classified as delinquent as long as it is considered collectable and efforts are being made to collect it.
- If the Hot Lunch Coordinator, or designee, attempts to request payment up to three times and there has been no response and/or no payment received, s/he will notify the School Director to determine an appropriate solution.
- The School Director, or designee, will contact the family and review with them their responsibility to provide meals for their child.
- Assistance from the county social services may be requested by the school if the parent(s)/guardian(s) refuse to provide meals or pay for school-prepared meals for their child.
- A formal letter will be sent to the household notifying that the debt will be turned over to a third-party collection agency.
- Debt may be carried over from year to year until paid in full.
- SRMCS reserves the right to accept cash-only payments if repeated late or non-payments have occurred.

Uncollectable Meal Debt See Articles IV and V above

- When the School Director determines further collection efforts for delinquent debt are useless or too costly, the debt will be re-classified as "uncollectable debt."
- When this re-classification is made, the debt is written off as an operating loss.
- Food service funds may not be used to cover costs related to uncollectable debt. These losses must be restored using non-federal funds such as the school district's general fund, so a transfer must be made into the Food Service Fund (Fund 2) to cover the loss.
- Once delinquent meal charges are converted to uncollectable debt, records relating to those charges must be maintained in accordance with the record retention requirements.

MEAL SERVING PROCEDURES

The following steps are taken daily as part of SRMCS' meal serving procedures:

1. A capful of cafeteria sanitizer is diluted into a "red sanitizer" bucket with warm water. A designated wash cloth is used to wipe down serving carts and silver tables. This cloth is kept submerged in solution when it is not in use.
2. The vegetables/fruits from the previous day are taken from the designated student lunch refrigerator and put on the cart to take upstairs to the lunch service area.
3. Fruit and vegetables are placed on the cold serving buffet. Extra servings are kept inside the cooler underneath the buffet and/or in the designated refrigerator.
4. Serving trays are counted out for Children's House students and placed on designated lunch carts (one cart per classroom).
5. Lunch trays are counted out for each classroom. Prior to the first group being served, the trays are spread out on the designated silver serving table to the right. All other trays are stacked onto a designated black cart in preparation for subsequent groups of students.
6. A few minutes before each class comes into the lunch room, the entrees are portioned and served onto the trays.
7. Each student chooses a tray (with the entrée already served) then continues to the fruit/veggie bar where they select two items.
8. A trained staff member of the lunch program, or a designee, tallies each student meal served in the claims computer program provided by the Minnesota Department of Education (MDE). Students then leave the serving area with their fully reimbursable meal.
9. The students carry their lunch tray with a fully reimbursable meal back to their classroom. Note:
 - a. All E-2 students (grades 4-6) will have already picked up their milk and placed it on their tray (if they choose to have it that day) prior to being served lunch.
 - b. All E-1 (grades 1-3) and Children's House (prek-kindergarten) students receive their milk once returned to the classroom with their lunch tray. A designated student and/or staff member gather the number of milk cartons ordered, place them in a bin/basket, and bring them to the classroom. Students choose the milk type (skim, 1%, or chocolate) s/he ordered from the bin/basket and begin eating.

Legal References: Minn. Stat. § 123B.37 (Prohibited Fees)
Minn. Stat. § 124D.111 (School Meals Policies; Lunch Aid; Food Service Accounting)
42 U.S.C. § 1751 *et seq.* (Healthy and Hunger-Free Kids Act)
7 C.F.R. § 210 *et seq.* (School Lunch Program Regulations)
7 C.F.R. § 220.8 (School Breakfast Program Regulations)

Cross References: USDA Policy Memorandum SP 46-2016, Unpaid Meal Charges:
Local Meal Charge Policies (2016)
USDA Policy Memorandum SP 47-2016, Unpaid Meal Charges:
Clarification on Collection of Delinquent Meal Payments (2016)
USDA Policy Memorandum SP 23-2017, Unpaid Meal Charges:
Guidance and Q&A

Appendix D – Student Records

Swan River Montessori Charter School

Adopted: 8.29.05

Revised: 4.13.26

MSBA/MASA Model Policy 515 Charter

Orig. 1995 (ISD)

Orig. 2022 (Charter)

Rev. 2025

515 PROTECTION AND PRIVACY OF PUPIL RECORDS

I. PURPOSE

SRMCS recognizes its responsibility in regard to the collection, maintenance, and dissemination of pupil records and the protection of the privacy rights of students as provided in federal law and state statutes.

II. GENERAL STATEMENT OF POLICY

The following procedures and policies regarding the protection and privacy of parents and students are adopted by the charter school, pursuant to the requirements of 20 United States Code, section 1232g, *et seq.*, (Family Educational Rights and Privacy Act (FERPA)) 34 Code of Federal Regulations, part 99 and consistent with the requirements of the Minnesota Government Data Practices Act, Minnesota Statutes, chapter 13, and Minnesota Rules, parts 1205.0100-1205.2000.

III. DEFINITIONS

A. Authorized Representative

"Authorized representative" means any entity or individual designated by the charter school, state, or an agency headed by an official of the Comptroller of the United States, the Attorney General of the United States, the Secretary of the U.S. Department of Education, or state and local educational authorities to conduct, with respect to federal or state supported education programs, any audit or evaluation or any compliance or enforcement activity in connection with federal legal requirements that relate to these programs.

B. Biometric Record

"Biometric record," as referred to in "Personally Identifiable," means a record of one or more measurable biological or behavioral characteristics that can be used for automated recognition of an individual (e.g., fingerprints, retina and iris patterns, voiceprints, DNA sequence, facial characteristics, and handwriting).

C. Dates of Attendance

"Dates of attendance," as referred to in "Directory Information," means the period of time during which a student attends or attended a school or schools in the charter school, including attendance in person or by paper correspondence, videoconference, satellite, Internet, or other electronic information and telecommunications technologies for students who are not in the classroom, and including the period during which a

student is working under a work-study program. The term does not include specific daily records of a student's attendance at a school or schools in the charter school.

D. Directory Information

1. "Directory information"

a. Under federal law, "directory information" means information contained in an education record of a student that would not generally be considered harmful or an invasion of privacy if disclosed. It includes the student's name, address, telephone listing, electronic mail address, photograph, date and place of birth, major field of study, dates of attendance, grade level, enrollment status (i.e., full-time or part-time), participation in officially recognized activities and sports, weight and height of members of athletic teams, degrees, honors and awards received, and the most recent educational agency or institution attended. It also includes the name, address, and telephone number of the student's parent(s). Directory information does not include:

- i. a student's social security number;
- ii. a student's identification number (ID), user ID, or other unique personal identifier used by a student for purposes of accessing or communicating in electronic systems if the identifier may be used to access education records without use of one or more factors that authenticate the student's identity such as a personal identification number (PIN), password, or other factor known or possessed only by the authorized user;
- iii. a student ID or other unique personal identifier that is displayed on a student ID badge if the identifier can be used to gain access to educational records when used in conjunction with one or more factors that authenticate the student's identity, such as a PIN, password, or other factor known or possessed only by the student;
- iv. personally identifiable data which references religion, race, color, social position, or nationality; or
- v. data collected from nonpublic school students, other than those who receive shared time educational services, unless written consent is given by the student's parent or guardian.

2. Under Minnesota law, Bluffview Montessori School may not designate a student's home address, telephone number, email address, or other personal contact information as "directory information."

E. Education Records

1. What constitutes "education records." Education records means those records that are: (1) directly related to a student; and (2) maintained by the charter school or by a party acting for the charter school.

2. What does not constitute education records. The term "education records" does not include:

a. Records of instructional personnel that are:

- (1) kept in the sole possession of the maker of the record;
- (2) used only as a personal memory aid;
- (3) not accessible or revealed to any other individual except a temporary substitute teacher; and

- (4) destroyed at the end of the school year.
- b. Records of a law enforcement unit of the charter school, provided education records maintained by the charter school are not disclosed to the unit, and the law enforcement records are:
 - (1) maintained separately from education records;
 - (2) maintained solely for law enforcement purposes; and
 - (3) disclosed only to law enforcement officials of the same jurisdiction.
- c. Records relating to an individual, including a student, who is employed by the charter school which:
 - (1) are made and maintained in the normal course of business;
 - (2) relate exclusively to the individual in that individual's capacity as an employee; and
 - (3) are not available for use for any other purpose.

However, records relating to an individual in attendance at the charter school who is employed as a result of his or her status as a student are education records.
- d. Records relating to an eligible student, or a student attending an institution of post-secondary education, that are:
 - (1) made or maintained by a physician, psychiatrist, psychologist, or other recognized professional or paraprofessional acting in his or her professional or paraprofessional capacity or assisting in that capacity;
 - (2) made, maintained, or used only in connection with the provision of treatment to the student; and
 - (3) disclosed only to individuals providing the treatment; provided that the records can be personally reviewed by a physician or other appropriate professional of the student's choice. For the purpose of this definition, "treatment" does not include remedial educational activities or activities that are a part of the program of instruction within the charter school.
- e. Records created or received by the charter school after an individual is no longer a student at the charter school and that are not directly related to the individual's attendance as a student.
- f. Grades on peer-related papers before the papers are collected and recorded by a teacher.

F. Education Support Services Data

"Education support services data" means data on individuals collected, created, maintained, used, or disseminated relating to programs administered by a government entity or entity under contract with a government entity designed to eliminate disparities

and advance equities in educational achievement for youth by coordinating services available to participants, regardless of the youth's involvement with other government services. Education support services data does not include welfare data under Minnesota Statutes, section 13.46.

Unless otherwise provided by law, all education support services data are private data on individuals and must not be disclosed except according to Minnesota Statutes, section 13.05 or a court order.

G. Eligible Student

"Eligible student" means a student who has attained eighteen (18) years of age or is attending an institution of post-secondary education.

H. Juvenile Justice System

"Juvenile justice system" includes criminal justice agencies and the judiciary when involved in juvenile justice activities.

I. Legitimate Educational Interest

"Legitimate educational interest" includes an interest directly related to classroom instruction, teaching, student achievement and progress, discipline of a student, student health and welfare, and the ability to respond to a request for education data. It includes a person's need to know in order to:

1. Perform an administrative task required in the school or employee's contract or position description approved by the school board;
2. Perform a supervisory or instructional task directly related to the student's education;
3. Perform a service or benefit for the student or the student's family such as health care, counseling, student job placement, or student financial aid; or
4. Perform a task directly related to responding to a request for data.

J. Parent

"Parent" means a parent of a student and includes a natural parent, a guardian, or an individual acting as a parent of the student in the absence of a parent or guardian. The charter school may presume the parent has the authority to exercise the rights provided herein, unless it has been provided with evidence that there is a state law or court order governing such matters as marriage dissolution, separation or child custody, or a legally binding instrument which provides to the contrary.

K. Personally Identifiable

"Personally identifiable" means that the data or information includes, but is not limited to: (a) a student's name; (b) the name of the student's parent or other family member; (c) the address of the student or student's family; (d) a personal identifier such as the student's social security number or student number or biometric record; (e) other indirect identifiers, such as the student's date of birth, place of birth, and mother's maiden name; (f) other information that, alone or in combination, is linked or linkable to a specific student that would allow a reasonable person in the school community, who does not have personal knowledge of the relevant circumstances, to identify the student

with reasonable certainty; or (g) information requested by a person who the charter school reasonably believes knows the identity of the student to whom the education record relates.

L. Record

"Record" means any information or data recorded in any way including, but not limited to, handwriting, print, computer media, video or audio tape, film, microfilm, and microfiche.

M. Responsible Authority

"Responsible authority" means Annette Vemuri, Director.

N. Student

"Student" includes any individual who is or has been in attendance, enrolled, or registered at the charter school and regarding whom the charter school maintains education records. Student also includes applicants for enrollment or registration at the charter school and individuals who receive shared time educational services from the charter school.

O. School Official

"School official" includes: (a) a person duly elected to the school board; (b) a person employed by the school board in an administrative, supervisory, instructional, or other professional position; (c) a person employed by the school board as a temporary substitute in a professional position for the period of his or her performance as a substitute; and (d) a person employed by, or under contract to, the school board to perform a special task such as a secretary, a clerk, a public information officer or data practices compliance official, an attorney, or an auditor for the period of his or her performance as an employee or contractor.

P. Summary Data

"Summary data" means statistical records and reports derived from data on individuals but in which individuals are not identified and from which neither their identities nor any other characteristic that could uniquely identify the individual is ascertainable.

Q. Other Terms and Phrases

All other terms and phrases shall be defined in accordance with applicable state and federal law or ordinary customary usage.

IV. GENERAL CLASSIFICATION

State law provides that all data collected, created, received, or maintained by a charter school are public unless classified by state or federal law as not public or private or confidential. State law classifies all data on individuals maintained by a charter school which relates to a student as private data on individuals. This data may not be disclosed to parties other than the parent or eligible student without consent, except pursuant to a valid court order, certain state statutes authorizing access, and the provisions of FERPA and the regulations promulgated thereunder.

V. STATEMENT OF RIGHTS

A. Rights of Parents and Eligible Students

Parents and eligible students have the following rights under this policy:

1. The right to inspect and review the student's education records;
2. The right to request the amendment of the student's education records to ensure that they are not inaccurate, misleading, or otherwise in violation of the student's privacy or other rights;
3. The right to consent to disclosures of personally identifiable information contained in the student's education records, except to the extent that such consent is not required for disclosure pursuant to this policy, state or federal law, or the regulations promulgated thereunder;
4. The right to refuse release of names, addresses, and home telephone numbers of students in grades 11 and 12 to military recruiting officers and post-secondary educational institutions;
5. The right to file a complaint with the U.S. Department of Education concerning alleged failures by the charter school to comply with the federal law and the regulations promulgated thereunder;
6. The right to be informed about rights under the federal law; and
7. The right to obtain a copy of this policy at the location set forth in Article XXI. of this policy.

B. Eligible Students

All rights and protections given to parents under this policy transfer to the student when he or she reaches eighteen (18) years of age or enrolls in an institution of post-secondary education. The student then becomes an "eligible student." However, the parents of an eligible student who is also a "dependent student" are entitled to gain access to the education records of such student without first obtaining the consent of the student. In addition, parents of an eligible student may be given access to education records in connection with a health or safety emergency if the disclosure meets the conditions of any provision set forth in 34 Code of Federal Regulations, section 99.31(a).

C. Students with a Disability

The charter school shall follow 34 Code of Federal Regulations, sections 300.610-300.617 with regard to the privacy, notice, access, recordkeeping, and accuracy of information related to students with a disability.

VI. DISCLOSURE OF EDUCATION RECORDS

A. Consent Required for Disclosure

1. The charter school shall obtain a signed and dated written informed consent of the parent of a student or the eligible student before disclosing personally identifiable information from the education records of the student, except as provided herein.

2. The written consent required by this subdivision must be signed and dated by the parent of the student or the eligible student giving the consent and shall include:
 - a. a specification of the records to be disclosed;
 - b. the purpose or purposes of the disclosure;
 - c. the party or class of parties to whom the disclosure may be made;
 - d. the consequences of giving informed consent; and
 - e. if appropriate, a termination date for the consent.
3. When a disclosure is made under this subdivision:
 - a. if the parent or eligible student so requests, the charter school shall provide him or her with a copy of the records disclosed; and
 - b. if the parent of a student who is not an eligible student so requests, the charter school shall provide the student with a copy of the records disclosed.
4. A signed and dated written consent may include a record and signature in electronic form that:
 - a. identifies and authenticates a particular person as the source of the electronic consent; and
 - b. indicates such person's approval of the information contained in the electronic consent.
5. If the responsible authority seeks an individual's informed consent to the release of private data to an insurer or the authorized representative of an insurer, informed consent shall not be deemed to have been given unless the statement is:
 - a. in plain language;
 - b. dated;
 - c. specific in designating the particular persons or agencies the data subject is authorizing to disclose information about the data subject;
 - d. specific as to the nature of the information the subject is authorizing to be disclosed;
 - e. specific as to the persons or agencies to whom the subject is authorizing information to be disclosed;
 - f. specific as to the purpose or purposes for which the information may be used by any of the parties named in Clause e. above, both at the time of the disclosure and at any time in the future; and

- g. specific as to its expiration date which should be within a reasonable time, not to exceed one year except in the case of authorizations given in connection with applications for: (i) life insurance or noncancellable or guaranteed renewable health insurance and identified as such, two years after the date of the policy, or (ii) medical assistance under Minnesota Statutes, chapter 256B or Minnesota Care under Minnesota Statutes, chapter 256L, which shall be ongoing during all terms of eligibility, for individualized education program health-related services provided by a charter school that are subject to third party reimbursement.

6. Eligible Student Consent

Whenever a student has attained eighteen (18) years of age or is attending an institution of post-secondary education, the rights accorded to and the consent required of the parent of the student shall thereafter only be accorded to and required of the eligible student, except as provided in Article V. of this policy.

B. Prior Consent for Disclosure Not Required

The charter school may disclose personally identifiable information from the education records of a student without the written consent of the parent of the student or the eligible student unless otherwise provided herein, if the disclosure is:

1. To other school officials, including teachers, within the charter school whom the charter school determines have a legitimate educational interest in such records;
2. To a contractor, consultant, volunteer, or other party to whom the charter school has outsourced institutional services or functions provided that the outside party:
 - a. performs an institutional service or function for which the charter school would otherwise use employees;
 - b. is under the direct control of the charter school with respect to the use and maintenance of education records; and
 - c. will not disclose the information to any other party without the prior consent of the parent or eligible student and uses the information only for the purposes for which the disclosure was made;
3. To officials of other schools, charter schools, or post-secondary educational institutions in which the student seeks or intends to enroll, or is already enrolled, as long as the disclosure is for purposes related to the student's enrollment or transfer. The records shall include information about disciplinary action taken as a result of any incident in which the student possessed or used a dangerous weapon, and with proper annual notice (see Section XIX.), suspension and expulsion information pursuant to section 7917 of the federal Every Student Succeeds Act, 20 United States Code section 7917, and, if applicable, data regarding a student's history of violent behavior. The records also shall include a copy of any probable cause notice or any disposition or court order under Minnesota Statutes, section 260B.171, unless the data are required to be

destroyed under Minnesota Statutes, section 120A.22, subdivision 7(c) or section 121A.75. On request, the charter school will provide the parent or eligible student with a copy of the education records that have been transferred and provide an opportunity for a hearing to challenge the content of those records in accordance with Article XV. of this policy;

4. To authorized representatives of the Comptroller General of the United States, the Attorney General of the United States, the Secretary of the U.S. Department of Education, or the Commissioner of the State Department of Education or his or her representative, subject to the conditions relative to such disclosure provided under federal law;
5. In connection with financial aid for which a student has applied or has received, if the information is necessary for such purposes as to:
 - a. determine eligibility for the aid;
 - b. determine the amount of the aid;
 - c. determine conditions for the aid; or
 - d. enforce the terms and conditions of the aid.

“Financial aid” for purposes of this provision means a payment of funds provided to an individual or a payment in kind of tangible or intangible property to the individual that is conditioned on the individual’s attendance at an educational agency or institution;

6. To state and local officials or authorities to whom such information is specifically allowed to be reported or disclosed pursuant to state statute adopted:
 - a. before November 19, 1974, if the allowed reporting or disclosure concerns the juvenile justice system and such system’s ability to effectively serve the student whose records are released; or
 - b. after November 19, 1974, if the reporting or disclosure allowed by state statute concerns the juvenile justice system and the system’s ability to effectively serve, prior to adjudication, the student whose records are released, provided the officials and authorities to whom the records are disclosed certify in writing to the charter school that the data will not be disclosed to any other party, except as provided by state law, without the prior written consent of the parent of the student. At a minimum, the charter school shall disclose the following information to the juvenile justice system under this paragraph: a student’s full name, home address, telephone number, and date of birth; a student’s school schedule, attendance record, and photographs, if any; and parents’ names, home addresses, and telephone numbers;
7. To organizations conducting studies for or on behalf of educational agencies or institutions for the purpose of developing, validating, or administering predictive tests, administering student aid programs, or improving instruction; provided that the studies are conducted in a manner which does not permit the personal identification of parents or students by individuals other than representatives of the organization who have a legitimate interest in the information, the information is destroyed when no longer needed for the purposes for which the

study was conducted, and the charter school enters into a written agreement with the organization that: (a) specifies the purpose, scope, and duration of the study or studies and the information to be disclosed; (b) requires the organization to use personally identifiable information from education records only to meet the purpose or purposes of the study as stated in the written agreement; (c) requires the organization to conduct the study in a manner that does not permit personal identification of parents and students by anyone other than representatives of the organization with legitimate interests; and (d) requires the organization to destroy all personally identifiable information when information is no longer needed for the purposes for which the study was conducted and specifies the time period in which the information must be destroyed. For purposes of this provision, the term, "organizations," includes, but is not limited to, federal, state, and local agencies and independent organizations. In the event the Department of Education determines that a third party outside of the charter school to whom information is disclosed violates this provision, the charter school may not allow that third party access to personally identifiable information from education records for at least five (5) years;

8. To accrediting organizations in order to carry out their accrediting functions;
9. To parents of a student eighteen (18) years of age or older if the student is a dependent of the parents for income tax purposes;
10. To comply with a judicial order or lawfully issued subpoena, provided, however, that the charter school makes a reasonable effort to notify the parent or eligible student of the order or subpoena in advance of compliance therewith so that the parent or eligible student may seek protective action, unless the disclosure is in compliance with a federal grand jury subpoena, or any other subpoena issued for law enforcement purposes, and the court or other issuing agency has ordered that the existence or the contents of the subpoena or the information furnished in response to the subpoena not be disclosed, or the disclosure is in compliance with an *ex parte* court order obtained by the United States Attorney General (or designee not lower than an Assistant Attorney General) concerning investigations or prosecutions of an offense listed in 18 United States Code, section 2332b(g)(5)(B), an act of domestic or international terrorism as defined in 18 United States Code, section 2331, or a parent is a party to a court proceeding involving child abuse and neglect or dependency matters, and the order is issued in the context of the proceeding. If the charter school initiates legal action against a parent or student, it may disclose to the court, without a court order or subpoena, the education records of the student that are relevant for the charter school to proceed with the legal action as a plaintiff. Also, if a parent or eligible student initiates a legal action against the charter school, the charter school may disclose to the court, without a court order or subpoena, the student's education records that are relevant for the charter school to defend itself;
11. To appropriate parties, including parents of an eligible student, in connection with an emergency if knowledge of the information is necessary to protect the health, including the mental health, or safety of the student or other individuals. The decision is to be based upon information available at the time the threat occurs that indicates that there is an articulable and significant threat to the health or safety of a student or other individuals. In making a determination

whether to disclose information under this section, the charter school may take into account the totality of the circumstances pertaining to a threat and may disclose information from education records to any person whose knowledge of the information is necessary to protect the health or safety of the student or other students. A record of this disclosure must be maintained pursuant to Paragraph XIII.E. of this policy. In addition, an educational agency or institution may include in the education records of a student appropriate information concerning disciplinary action taken against the student for conduct that posed a significant risk to the safety or well-being of that student, other students, or other members of the school community. This information may be disclosed to teachers and school officials within the charter school and/or teachers and school officials in other schools who have legitimate educational interests in the behavior of the student;

12. To the juvenile justice system if information about the behavior of a student who poses a risk of harm is reasonably necessary to protect the health or safety of the student or other individuals;
13. Information the charter school has designated as "directory information" pursuant to Article VII. of this policy;
14. To military recruiting officers and postsecondary educational institutions pursuant to Article XI. of this policy;
15. To the parent of a student who is not an eligible student or to the student himself or herself;
16. To appropriate health authorities to the extent necessary to administer immunization programs and for bona fide epidemiologic investigations which the commissioner of health determines are necessary to prevent disease or disability to individuals in the public educational agency or institution in which the investigation is being conducted;
17. To volunteers who are determined to have a legitimate educational interest in the data and who are conducting activities and events sponsored by or endorsed by the educational agency or institution for students or former students;
18. To the juvenile justice system, on written request that certifies that the information will not be disclosed to any other person except as authorized by law without the written consent of the parent of the student:
 - a. the following information about a student must be disclosed: a student's full name, home address, telephone number, date of birth; a student's school schedule, daily attendance record, and photographs, if any; and any parents' names, home addresses, and telephone numbers;
 - b. the existence of the following information about a student, not the actual data or other information contained in the student's education record, may be disclosed provided that a request for access must be submitted on the statutory form and it must contain an explanation of why access to the information is necessary to serve the student: (1) use of a controlled substance, alcohol, or tobacco; (2) assaultive or threatening conduct that could result in dismissal from school under the Pupil Fair Dismissal Act; (3) possession or use of weapons or look-alike weapons;

(4) theft; or (5) vandalism or other damage to property. Prior to releasing this information, the principal or chief administrative officer of a school who receives such a request must, to the extent permitted by federal law, notify the student's parent or guardian by certified mail of the request to disclose information. If the student's parent or guardian notifies the school official of an objection to the disclosure within ten (10) days of receiving certified notice, the school official must not disclose the information and instead must inform the requesting member of the juvenile justice system of the objection. If no objection from the parent or guardian is received within fourteen (14) days, the school official must respond to the request for information.

The written requests of the juvenile justice system member(s), as well as a record of any release, must be maintained in the student's file;

19. To the principal where the student attends and to any counselor directly supervising or reporting on the behavior or progress of the student if it is information from a disposition order received by an executive director under Minnesota Statutes, section 260B.171, subdivision 3. The director must notify the counselor immediately and must place the disposition order in the student's permanent education record. The principal also must notify immediately any teacher or administrator who directly supervises or reports on the behavior or progress of the student whom the director believes needs the information to work with the student in an appropriate manner, to avoid being needlessly vulnerable, or to protect other persons from needless vulnerability. The principal may also notify other charter school employees, substitutes, and volunteers who are in direct contact with the student if the director determines that these individuals need the information to work with the student in an appropriate manner, to avoid being needlessly vulnerable, or to protect other persons from needless vulnerability. Such notices from the principal must identify the student, outline the offense, and describe any conditions of probation about which the school must provide information if this information is provided in the disposition order. Disposition order information received is private educational data received for the limited purpose of serving the educational needs of the student and protecting students and staff. The information may not be further disseminated by the counselor, teacher, administrator, staff member, substitute, or volunteer except as necessary to serve the student, to protect students and staff, or as otherwise required by law, and only to the student or the student's parent or guardian;
20. To the principal where the student attends if it is information from a peace officer's record of children received by an executive director under Minnesota Statutes, section 260B.171, subdivision 5. The principal must place the information in the student's education record. The principal also must notify immediately any teacher, counselor, or administrator directly supervising the student whom the principal believes needs the information to work with the student in an appropriate manner, to avoid being needlessly vulnerable, or to protect other persons from needless vulnerability. The principal may also notify other charter school employees, substitutes, and volunteers who are in direct contact with the student if the principal determines that these individuals need the information to work with the student in an appropriate manner, to avoid being needlessly vulnerable, or to protect other persons from needless

vulnerability. Such notices from the principal must identify the student and describe the alleged offense if this information is provided in the peace officer's notice. Peace officer's record information received is private educational data received for the limited purpose of serving the educational needs of the student and protecting students and staff. The information must not be further disseminated by the counselor, teacher administrator, staff member, substitute, or volunteer except to communicate with the student or the student's parent or guardian as necessary to serve the student, to protect students and staff, or as otherwise required by law.

The principal must delete the peace officer's record from the student's education record, destroy the data, and make reasonable efforts to notify any teacher, counselor, staff member, administrator, substitute, or volunteer who received information from the peace officer's record if the county attorney determines not to proceed with a petition or directs the student into a diversion or mediation program or if a juvenile court makes a decision on a petition and the county attorney or juvenile court notifies the executive director of such action;

21. To the Secretary of Agriculture, or authorized representative from the Food and Nutrition Service or contractors acting on behalf of the Food and Nutrition Service, for the purposes of conducting program monitoring, evaluations, and performance measurements of state and local educational and other agencies and institutions receiving funding or providing benefits of one or more programs authorized under the National School Lunch Act or the Child Nutrition Act of 1966 for which the results will be reported in an aggregate form that does not identify any individual, on the conditions that: (a) any data collected shall be protected in a manner that will not permit the personal identification of students and their parents by other than the authorized representatives of the Secretary; and (b) any personally identifiable data shall be destroyed when the data are no longer needed for program monitoring, evaluations, and performance measurements; or
22. To an agency caseworker or other representative of a State or local child welfare agency, or tribal organization (as defined in 25 United States Code, section 5304), who has the right to access a student's case plan, as defined and determined by the State or tribal organization, when such agency or organization is legally responsible, in accordance with State or tribal law, for the care and protection of the student, provided that the education records, or the personally identifiable information contained in such records, of the student will not be disclosed by such agency or organization, except to an individual or entity engaged in addressing the student's education needs and authorized by such agency or organization to receive such disclosure and such disclosure is consistent with the State or tribal laws applicable to protecting the confidentiality of a student's education records.
23. When requested, and in accordance with requirements for parental consent in 34 Code of Federal Regulations, section 300.622(b)(2), and part 99, educational agencies or institutions may share personal student contact information and directory information for students served in special education with postsecondary transition planning and services under Minnesota Statutes, section 125A.08, paragraph (b), clause (1), whether public or private, with the Minnesota Department of Employment and Economic Development, as required

for coordination of services to students with disabilities under Minnesota Statutes, sections 125A.08, paragraph (b), clause (1); 125A.023; and 125A.027.

C. Nonpublic School Students

The charter school may disclose personally identifiable information from the education records of a nonpublic school student, other than a student who receives shared time educational services, without the written consent of the parent of the student or the eligible student unless otherwise provided herein, if the disclosure is:

1. Pursuant to a valid court order;
2. Pursuant to a statute specifically authorizing access to the private data; or
3. To appropriate health authorities to the extent necessary to administer immunization programs and for bona fide epidemiological investigations which the commissioner of health determines are necessary to prevent disease or disability to individuals in the public educational agency or institution in which the investigation is being conducted.

VII. RELEASE OF DIRECTORY INFORMATION

A. Educational Data

1. Educational data designated as directory information is public data on individuals to the extent required under federal law. Directory information must be designated pursuant to the provisions of:
 - a. Minnesota Statutes, section 13.32, subdivision 5; and
 - b. 20 United States Code, section 1232g, and 34 Code of Federal Regulations, section 99.37, which were in effect on January 3, 2012.
2. The charter school may not designate a student's home address, telephone number, email address, or other personal contact information as directory information under Minnesota Statutes, section 13.32.
3. A parent's personal contact information must be treated as private data on individuals regardless of whether that contact information was previously designated as or treated as directory information under Minnesota Statutes, section 13.32, subdivision 2.
4. When requested, the charter school must share personal contact information and directory information, whether public or private, with the Minnesota Department of Education, as required for federal reporting purposes.

B. Former Students

Unless a former student validly opted out of the release of directory information while the student was in attendance and has not rescinded the opt out request at any time, SRMCS may disclose directory information from the education records generated by it regarding the former student without meeting the requirements of Paragraph C. of this Article. In addition, under an explicit exclusion from the definition of an "education record," SRMCS may release records that only contain information about an individual

obtained after he or she is no longer a student at the charter school and that are not directly related to the individual's attendance as a student (e.g., a student's activities as an alumnus of the charter school).

C. Present Students and Parents

SRMCS may disclose directory information from the education records of a student and information regarding parents without prior written consent of the parent of the student or eligible student, except as provided herein.

1. When conducting the directory information designation and notice process required by federal law, the charter school shall give parents and students notice of the right to refuse to let the charter school designate specified data about the student as directory information.
2. The charter school shall give annual notice by any means that are reasonably likely to inform the parents and eligible students of:
 - a. the types of personally identifiable information regarding students and/or parents that the charter school has designated as directory information;
 - b. the parent's or eligible student's right to refuse to let the charter school designate any or all of those types of information about the student and/or the parent as directory information; and
 - c. the period of time in which a parent or eligible student has to notify the charter school in writing that he or she does not want any or all of those types of information about the student and/or the parent designated as directory information.
2. Allow a reasonable period of time after such notice has been given for a parent or eligible student to inform the charter school in writing that any or all of the information so designated should not be disclosed without the parent's or eligible student's prior written consent, except as provided in Article VI. of this policy.
3. A parent or eligible student may not opt out of the directory information disclosures to:
 - a. prevent the charter school from disclosing or requiring the student to disclose the student's name, ID, or charter school e-mail address in a class in which the student is enrolled; or
 - b. prevent the charter school from requiring a student to wear, to display publicly, or to disclose a student ID card or badge that exhibits information that may be designated as directory information and that has been properly designated by the charter school as directory information.
4. The charter school shall not disclose or confirm directory information without meeting the written consent requirements contained in Paragraph VI.A. of this policy if a student's social security number or other non-directory information is used alone or in combination with other data elements to identify or help identify the student or the student's records.

D. Procedure for Obtaining Nondisclosure of Directory Information

The parent's or eligible student's written notice shall be directed to the responsible authority and shall include the following:

1. Name of the student and/or parent, as appropriate;
2. Home address;
3. School presently attended by student;
4. Parent's legal relationship to student, if applicable; and
5. Specific categories of directory information to be made not public without the parent's or eligible student's prior written consent, which shall only be applicable for that school year.

E. Duration

The designation of any information as directory information about a student or parents will remain in effect for the remainder of the school year unless the parent or eligible student provides the written notifications provided herein.

VIII. DISCLOSURE OF PRIVATE RECORDS

A. Private Records

For the purposes herein, education records are records which are classified as private data on individuals by state law and which are accessible only to the student who is the subject of the data and the student's parent if the student is not an eligible student. The charter school may not disclose private records or their contents except as summary data, or except as provided in Article VI. of this policy, without the prior written consent of the parent or the eligible student. The charter school will use reasonable methods to identify and authenticate the identity of parents, students, school officials, and any other party to whom personally identifiable information from education records is disclosed.

B. Private Records Not Accessible to Parent

In certain cases, state law intends, and clearly provides, that certain information contained in the education records of the charter school pertaining to a student be accessible to the student alone, and to the parent only under special circumstances, if at all.

1. The responsible authority may deny access to private data by a parent when a minor student who is the subject of that data requests that the responsible authority deny such access. The minor student's request must be submitted in writing setting forth the reasons for denying access to the parent and must be signed by the minor. Upon receipt of such request the responsible authority shall determine if honoring the request to deny the parent access would be in the best interest of the minor data subject. In making this determination the responsible authority shall consider the following factors:

- a. whether the minor is of sufficient age and maturity to be able to explain the reasons for and understand the consequences of the request to deny access;
- b. whether the personal situation of the minor is such that denying parental access may protect the minor data subject from physical or emotional harm;
- c. whether there are grounds for believing that the minor data subject's reasons for precluding parental access are reasonably accurate;
- d. whether the data in question is of such a nature that disclosure of it to the parent may lead to physical or emotional harm to the minor data subject; and
- e. whether the data concerns medical, dental or other health services provided pursuant to Minnesota Statutes, sections 144.341-144.347, in which case the data may be released only if the failure to inform the parent would seriously jeopardize the health of the minor.

C. Private Records Not Accessible to Student

Students shall not be entitled to access to private data concerning financial records and statements of the student's parent or any information contained therein.

D. Military-Connected Youth Identifier

When a charter school updates its enrollment forms in the ordinary course of business, the charter school must include a box on the enrollment form to allow students to self-identify as a military-connected youth. For purposes of this section, a "military-connected youth" means having an immediate family member, including a parent or sibling, who is currently in the armed forces either as a reservist or on active duty or has recently retired from the armed forces. Data collected under this provision is private data on individuals, but summary data may be published by the Department of Education.

IX. **DISCLOSURE OF CONFIDENTIAL RECORDS**

A. Confidential Records

Confidential records are those records and data contained therein which are made not public by state or federal law, and which are inaccessible to the student and the student's parents or to an eligible student.

B. Reports Under the Maltreatment of Minors Reporting Act

Pursuant to Minnesota Statutes, chapter 260E, written copies of reports pertaining to a neglected and/or physically and/or sexually abused child shall be accessible only to the appropriate welfare and law enforcement agencies. In respect to other parties, such data shall be confidential and will not be made available to the parent or the subject individual by the charter school. The subject individual, however, may obtain a copy of the report from either the local welfare agency, county sheriff, or the local police department subject to the provisions of Minnesota Statutes, chapter 260E.

Regardless of whether a written report is made under Minnesota Statutes, chapter 260E, as soon as practicable after a school receives information regarding an incident that may constitute maltreatment of a child in a school facility, the school shall inform the parent, legal guardian, or custodian of the child that an incident occurred that may constitute maltreatment of the child, when the incident occurred, and the nature of the conduct that may constitute maltreatment.

C. Investigative Data

Data collected by the charter school as part of an active investigation undertaken for the purpose of the commencement or defense of pending civil legal action, or are retained in anticipation of a pending civil legal action are classified as protected nonpublic data in the case of data not on individuals, and confidential data in the case of data on individuals.

1. The charter school may make any data classified as protected non-public or confidential pursuant to this subdivision accessible to any person, agency, or the public if the charter school determines that such access will aid the law enforcement process, promote public health or safety, or dispel widespread rumor or unrest.
2. A complainant has access to a statement he or she provided to the charter school.
3. Parents or eligible students may have access to investigative data of which the student is the subject, but only to the extent the data is not inextricably intertwined with data about other charter school students, charter school employees, and/or attorney data as defined in Minnesota Statutes, section 13.393.
4. Once a civil investigation becomes inactive, civil investigative data becomes public unless the release of the data would jeopardize another pending civil legal action, except for those portions of such data that are classified as not public data under state or federal law. Any civil investigative data presented as evidence in court or made part of a court record shall be public. For purposes of this provision, a civil investigation becomes inactive upon the occurrence of any of the following events:
 - a. a decision by the charter school, or by the chief attorney for the charter school, not to pursue the civil legal action. However, such investigation may subsequently become active if the charter school or its attorney decides to renew the civil legal action;
 - b. the expiration of the time to file a complaint under the statute of limitations or agreement applicable to the civil legal action; or
 - c. the exhaustion or expiration of rights of appeal by either party to the civil legal action.
5. A "pending civil legal action" for purposes of this subdivision is defined as including, but not limited to, judicial, administrative, or arbitration proceedings.

D. Chemical Abuse Records

To the extent the charter school maintains records of the identity, diagnosis, prognosis, or treatment of any student which are maintained in connection with the performance of any drug abuse prevention function conducted, regulated, or directly or indirectly assisted by any department or agency of the United States, such records are classified as confidential and shall be disclosed only for the purposes and under the circumstances expressly authorized by law.

X. DISCLOSURE OF SCHOOL RECORDS PRIOR TO EXCLUSION OR EXPULSION HEARING

At a reasonable time prior to any exclusion or expulsion hearing, the student and the student's parent or guardian or representative shall be given access to all charter school records pertaining to the student, including any tests or reports upon which the action proposed by the charter school may be based, pursuant to the Minnesota Pupil Fair Dismissal Act, Minnesota Statutes, section 121A.40, *et seq.*

XI. DISCLOSURE OF DATA TO MILITARY RECRUITING OFFICERS AND POSTSECONDARY EDUCATIONAL INSTITUTIONS

- A. The charter school will release the names, addresses, electronic mail address (which shall be the electronic mail addresses provided by the charter school, if available, that may be released to military recruiting officers only), and home telephone numbers of students in grades 11 and 12 to military recruiting officers and postsecondary educational institutions within sixty (60) days after the date of the request unless a parent or eligible student has refused in writing to release this data pursuant to Paragraph C. below.
- B. Data released to military recruiting officers under this provision:
 - 1. may be used only for the purpose of providing information to students about military service, state and federal veterans' education benefits, and other career and educational opportunities provided by the military;
 - 2. cannot be further disseminated to any other person except personnel of the recruiting services of the armed forces; and
 - 3. copying fees shall not be imposed.
- C. A parent or eligible student has the right to refuse the release of the name, address, electronic mail addresses (which shall be the electronic mail addresses provided by the school, if available, that may be released to military recruiting officers only) or home telephone number to military recruiting officers and post-secondary educational institutions. To refuse the release of the above information to military recruiting officers and post-secondary educational institutions, a parent or eligible student must notify the responsible authority school director in writing by April 1st each year. The written request must include the following information:
 - 1. Name of student and parent, as appropriate;
 - 2. Home address;

3. Student's grade level;
 4. School presently attended by student;
 5. Parent's legal relationship to student, if applicable;
 6. Specific category or categories of information which are not to be released to military recruiting officers and post-secondary educational institutions; and
 7. Specific category or categories of information which are not to be released to the public, including military recruiting officers and post-secondary educational institutions.
- D. Annually, the charter school will provide public notice by any means that are reasonably likely to inform the parents and eligible students of their rights to refuse to release the names, addresses, and home phone numbers of students in grades 11 and 12 without prior consent.
- E. A parent or eligible student's refusal to release the above information to military recruiting officers and postsecondary educational institutions does not affect the charter school's release of directory information to the rest of the public, which includes military recruiting officers and postsecondary educational institutions. In order to make any directory information about a student private, the procedures contained in Article VII. of this policy also must be followed. Accordingly, to the extent the charter school has designated the name, address, home phone number, and grade level of students as directory information, absent a request from a parent or eligible student not to release such data, this information will be public data and accessible to members of the public, including military recruiting officers and postsecondary educational institutions.

XII. LIMITS ON REDISCLOSURE

A. Redisclosure

Consistent with the requirements herein, the charter school may only disclose personally identifiable information from the education records of a student on the condition that the party to whom the information is to be disclosed will not disclose the information to any other party without the prior written consent of the parent of the student or the eligible student, except that the officers, employees, and agents of any party receiving personally identifiable information under this section may use the information, but only for the purposes for which the disclosure was made.

B. Redisclosure Not Prohibited

1. Paragraph A. of this section does not prevent the charter school from disclosing personally identifiable information under Article VI. of this policy with the understanding that the party receiving the information may make further disclosures of the information on behalf of the charter school provided:
 - a. The disclosures meet the requirements of Article VI. of this policy; and

- b. The charter school has complied with the record-keeping requirements of Article XIII. of this policy.
 - 2. Paragraph A. of this Article does not apply to disclosures made pursuant to court orders or lawfully issued subpoenas or litigation, to disclosures of directory information, to disclosures to a parent or student or to parents of dependent students, or to disclosures concerning sex offenders and other individuals required to register under 42 United States Code, section 14071. However, the charter school must provide the notification required in Paragraph XII.D. of this policy if a redisclosure is made based upon a court order or lawfully issued subpoena.
- C. Classification of Disclosed Data
- The information disclosed shall retain the same classification in the hands of the party receiving it as it had in the hands of the charter school.
- D. Notification
- The charter school shall inform the party to whom a disclosure is made of the requirements set forth in this section, except for disclosures made pursuant to court orders or lawfully issued subpoenas, disclosure of directory information under Article VII. of this policy, disclosures to a parent or student, or disclosures to parents of a dependent student. In the event that the Family Policy Compliance Office determines that a state or local educational authority, a federal agency headed by an official listed in 34 Code of Federal Regulations, section 99.31(a)(3), or an authorized representative of a state or local educational authority or a federal agency headed by an official listed in section 99.31(a)(3), or a third party outside of the charter school improperly rediscloses personally identifiable information from education records or fails to provide notification required under this section of this policy, the charter school may not allow that third party access to personally identifiable information from education records for at least five (5) years.

XIII. RESPONSIBLE AUTHORITY; RECORD SECURITY; AND RECORD KEEPING

- A. Responsible Authority
- The responsible authority shall be responsible for the maintenance and security of student records.
- B. Record Security
- The School Director, the Operations Manager, and/or a designee, shall be the records manager of the school, and shall have the duty of maintaining and securing the privacy and/or confidentiality of student records.
- C. Plan for Securing Student Records
- The building principal shall submit to the responsible authority a written plan for securing students records by September 1 of each school year. The written plan shall contain the following information:

1. A description of records maintained;
2. Titles and addresses of person(s) responsible for the security of student records;
3. Location of student records, by category, in the buildings;
4. Means of securing student records; and
5. Procedures for access and disclosure.

D. Review of Written Plan for Securing Student Records

The responsible authority shall review the plans submitted pursuant to Paragraph C. of this Article for compliance with the law, this policy, and the various administrative policies of the charter school. The responsible authority shall then promulgate a chart incorporating the provisions of Paragraph C. which shall be attached to and become a part of this policy.

E. Record Keeping

1. The director shall, for each request for and each disclosure of personally identifiable information from the education records of a student, maintain a record, with the education records of the student, that indicates:
 - a. the parties who have requested or received personally identifiable information from the education records of the student;
 - b. the legitimate interests these parties had in requesting or obtaining the information; and
 - c. the names of the state and local educational authorities and federal officials and agencies listed in Section VI.B.4. of this policy that may make further disclosures of personally identifiable information from the student's education records without consent.
2. In the event the charter school discloses personally identifiable information from an education record of a student pursuant to Paragraph XII.B. of this policy, the record of disclosure required under this section shall also include:
 - a. the names of the additional parties to which the receiving party may disclose the information on behalf of the charter school;
 - b. the legitimate interests under Article VI. of this policy which each of the additional parties has in requesting or obtaining the information; and
 - c. a copy of the record of further disclosures maintained by a state or local educational authority or federal official or agency listed in Subparagraph VI.B.4. of this policy in accordance with 34 Code of Federal Regulations, section 99.32 and to whom the charter school disclosed information from an education record. The charter school shall request a copy of the record of further disclosures from a state or local educational authority or federal official or agency to whom education records were disclosed upon a request from a parent or eligible student to review the record of requests for disclosure.

3. Subparagraph XIII.E.1. does not apply to requests by or disclosure to a parent of a student or an eligible student, disclosures pursuant to the written consent of a parent of a student or an eligible student, requests by or disclosures to other school officials under Subparagraph VI.B.1. of this policy, to requests for disclosures of directory information under Article VII. of this policy, or to a party seeking or receiving the records as directed by a federal grand jury or other law enforcement subpoena and the issuing court or agency has ordered that the existence or the contents of the subpoena or the information provided in response to the subpoena not be disclosed or as directed by an *ex parte* court order obtained by the United States Attorney General (or designee not lower than an Assistant Attorney General) concerning investigations or prosecutions of an offense listed in 18 United States Code, section 2332b(g)(5)(B) or an act of domestic or international terrorism.
4. The record of requests of disclosures may be inspected by:
 - a. the parent of the student or the eligible student;
 - b. the school official or his or her assistants who are responsible for the custody of the records; and
 - c. the parties authorized by law to audit the record-keeping procedures of the charter school.
5. The charter school shall record the following information when it discloses personally identifiable information from education records under the health or safety emergency exception:
 - a. the articulable and significant threat to the health or safety of a student or other individual that formed the basis for the disclosure; and
 - b. the parties to whom the charter school disclosed the information.
6. The record of requests and disclosures shall be maintained with the education records of the student as long as the charter school maintains the student's education records.

XIV. RIGHT TO INSPECT AND REVIEW EDUCATION RECORDS

A. Parent of a Student, an Eligible Student or the Parent of an Eligible Student Who is Also a Dependent Student

The charter school shall permit the parent of a student, an eligible student, or the parent of an eligible student who is also a dependent student who is or has been in attendance in the charter school to inspect or review the education records of the student, except those records which are made confidential by state or federal law or as otherwise provided in Article VIII. of this policy.

B. Response to Request for Access

The charter school shall respond to any request pursuant to Paragraph A. of this Article immediately, if possible, or within ten (10) days of the date of the request, excluding Saturdays, Sundays, and legal holidays.

C. Right to Inspect and Review

The right to inspect and review education records under Paragraph A. of this Article includes:

1. The right to a response from the charter school to reasonable requests for explanations and interpretations of records; and
2. If circumstances effectively prevent the parent or eligible student from exercising the right to inspect and review the education records, the charter school shall provide the parent or eligible student with a copy of the records requested or make other arrangements for the parent or eligible student to inspect and review the requested records.
3. Nothing in this policy shall be construed as limiting the frequency of inspection of the education records of a student with a disability by the student's parent or guardian or by the student upon the student reaching the age of majority.

D. Form of Request

Parents or eligible students shall submit to the charter school a written request to inspect education records which identify as precisely as possible the record or records he or she wishes to inspect.

E. Collection of Student Records

If a student's education records are maintained in more than one location, the responsible authority may collect copies of the records or the records themselves from the various locations so they may be inspected at one site. However, if the parent or eligible student wishes to inspect these records where they are maintained, the charter school shall attempt to accommodate those wishes. The parent or eligible student shall be notified of the time and place where the records may be inspected.

F. Records Containing Information on More Than One Student

If the education records of a student contain information on more than one student, the parent or eligible student may inspect and review or be informed of only the specific information which pertains to that student.

G. Authority to Inspect or Review

The charter school may presume that either parent of the student has authority to inspect or review the education records of a student unless the charter school has been provided with evidence that there is a legally binding instrument or a state law or court order governing such matters as marriage dissolution, separation, or custody which provides to the contrary.

H. Fees for Copies of Records

1. The charter school shall charge a reasonable fee for providing photocopies or printed copies of records unless printing a copy is the only method to provide for the inspection of data. In determining the amount of the reasonable fee, the charter school shall consider the following:

- a. the cost of materials, including paper, used to provide the copies;
 - b. the cost of the labor required to prepare the copies;
 - c. any schedule of standard copying charges established by the charter school in its normal course of operations;
 - d. any special costs necessary to produce such copies from machine-based record-keeping systems, including but not limited to computers and microfilm systems; and
 - e. mailing costs.
- 2. If one hundred (100) or fewer pages of black and white, letter or legal size paper copies are requested, actual costs shall not be used, and, instead, the charge shall be no more than twenty-five (25) cents for each page copied.
 - 3. The cost of providing copies shall be borne by the parent or eligible student.
 - 4. The responsible authority, however, may not impose a fee for a copy of an education record made for a parent or eligible student if doing so would effectively prevent or, in the case of a student with a disability, impair the parent or eligible student from exercising their right to inspect or review the student's education records.

XV. REQUEST TO AMEND RECORDS; PROCEDURES TO CHALLENGE DATA

A. Request to Amend Education Records

The parent of a student or an eligible student who believes that information contained in the education records of the student is inaccurate, misleading, or violates the privacy rights of the student may request that the charter school amend those records.

- 1. The request shall be in writing, shall identify the item the requestor believes to be inaccurate, misleading, or in violation of the privacy or other rights of the student, shall state the reason for this belief, and shall specify the correction the requestor wishes the charter school to make. The request shall be signed and dated by the requestor.
- 2. SRMCS shall decide whether to amend the education records of the student in accordance with the request within thirty (30) days after receiving the request.
- 3. If SRMCS decides to refuse to amend the education records of the student in accordance with the request, it shall inform the parent of the student or the eligible student of the refusal and advise the parent or eligible student of the right to a hearing under Paragraph B. of this Article.

B. Right to a Hearing

If SRMCS refuses to amend the education records of a student, the charter school, on request, shall provide an opportunity for a hearing in order to challenge the content of the student's education records to ensure that information in the education records of the student is not inaccurate, misleading, or otherwise in violation of the privacy or other rights of the student. A hearing shall be conducted in accordance with Paragraph C. of this Article.

1. If, as a result of the hearing, SRMCS decides that the information is inaccurate, misleading, or otherwise in violation of the privacy or other rights of the student, it shall amend the education records of the student accordingly and so inform the parent of the student or the eligible student in writing.
2. If, as a result of the hearing, SRMCS decides that the information is not inaccurate, misleading, or otherwise in violation of the privacy or other rights of the student, it shall inform the parent or eligible student of the right to place a statement in the record commenting on the contested information in the record or stating why he or she disagrees with the decision of the charter school, or both.
3. Any statement placed in the education records of the student under Paragraph B. of this Article shall:
 - a. be maintained by SRMCS as part of the education records of the student so long as the record or contested portion thereof is maintained by the charter school; and
 - b. if the education records of the student or the contested portion thereof is disclosed by the charter school to any party, the explanation shall also be disclosed to that party.

C. Conduct of Hearing

1. The hearing shall be held within a reasonable period of time after the charter school has received the request, and the parent of the student or the eligible student shall be given notice of the date, place, and time reasonably in advance of the hearing.
2. The hearing may be conducted by any individual, including an official of the charter school who does not have a direct interest in the outcome of the hearing. The school board attorney shall be in attendance to present the school board's position and advise the designated hearing officer on legal and evidentiary matters.
3. The parent of the student or eligible student shall be afforded a full and fair opportunity for hearing to present evidence relative to the issues raised under Paragraph A. and B. of this Article and may be assisted or represented by individuals of his or her choice at his or her own expense, including an attorney.
4. The charter school shall make a decision in writing within a reasonable period of time after the conclusion of the hearing. The decision shall be based solely on evidence presented at the hearing and shall include a summary of evidence and reasons for the decision.

D. Appeal

The final decision of the designated hearing officer may be appealed in accordance with the applicable provisions of Minnesota Statutes, chapter 14 relating to contested cases.

XVI. PROBLEMS ACCESSING DATA

- A. The data practices compliance official is the designated employee to whom persons may direct questions or concerns regarding problems in obtaining access to data or other data practices problems.
- B. Data practices compliance official means Director of SRMCS.
- C. Any request by an individual with a disability for reasonable modifications of the charter school's policies or procedures for purposes of accessing records shall be made to the data practices compliance official.

XVII. COMPLAINTS FOR NONCOMPLIANCE WITH FERPA

A. Where to File Complaints

Complaints regarding alleged violations of rights accorded parents and eligible students by FERPA, and the rules promulgated thereunder, shall be submitted in writing to the U.S. Department of Education, Student Privacy Policy Office, 400 Maryland Avenue S.W., Washington, D.C. 20202-8520.

B. Content of Complaint

A complaint filed pursuant to this section must contain specific allegations of fact giving reasonable cause to believe that a violation of FERPA and the rules promulgated thereunder has occurred.

XVIII. WAIVER

A parent or eligible student may waive any of his or her rights provided herein pursuant to FERPA. A waiver shall not be valid unless in writing and signed by the parent or eligible student. The charter school may not require such a waiver.

XIX. ANNUAL NOTIFICATION OF RIGHTS

A. Contents of Notice

The charter school shall give parents of students currently in attendance and eligible students currently in attendance annual notice by such means as are reasonably likely to inform the parents and eligible students of the following:

1. That the parent or eligible student has a right to inspect and review the student's education records and the procedure for inspecting and reviewing education records;

2. That the parent or eligible student has a right to seek amendment of the student's education records to ensure that those records are not inaccurate, misleading, or otherwise in violation of the student's privacy or other rights and the procedure for requesting amendment of records;
 3. That the parent or eligible student has a right to consent to disclosures of personally identifiable information contained in the student's education records, except to the extent that federal and state law and the regulations promulgated thereunder authorize disclosure without consent;
 4. That the parent or eligible student has a right to file a complaint with the U.S. Department of Education regarding an alleged failure by the charter school to comply with the requirements of FERPA and the rules promulgated thereunder;
 5. The criteria for determining who constitutes a school official and what constitutes a legitimate educational interest for purposes of disclosing education records to other school officials whom the charter school has determined to have legitimate educational interests; and
 6. That the charter school forwards education records on request to a school in which a student seeks or intends to enroll or is already enrolled as long as the disclosure is for purposes related to the student's enrollment or transfer and that such records may include suspension and expulsion records pursuant to the federal Every Student Succeeds Act and, if applicable, a student's history of violent behavior.
- B. Notification to Parents of Students Having a Primary Home Language Other Than English
- The charter school shall provide for the need to effectively notify parents of students identified as having a primary or home language other than English.
- C. Notification to Parents or Eligible Students Who are Disabled
- The charter school shall provide for the need to effectively notify parents or eligible students identified as disabled.

XX. DESTRUCTION AND RETENTION OF RECORDS

Destruction and retention of records by the charter school shall be controlled by state and federal law.

XXI. COPIES OF POLICY

Copies of this policy may be obtained by parents and eligible students at the SRMCS office. This policy will also be made available to the public via the SRMCS web site.

Legal References: Minn. Stat. Ch. 13 (Minnesota Government Data Practices Act)
Minn. Stat. § 13.32, Subd. 5 (Directory Information)
Minn. Stat. § 13.393 (Attorneys)
Minn. Stat. Ch. 14 (Administrative Procedures Act)
Minn. Stat. § 120A.22 (Compulsory Instruction)
Minn. Stat. § 121A.40-121A.56 (The Pupil Fair Dismissal Act)

Minn. Stat. § 121A.75 (Receipt of Records; Sharing)
 Minn. Stat. § 127A.852 (Military-Connected Youth Identifier)
 Minn. Stat. § 144.341-144.347 (Consent of Minors for Health Services)
 Minn. Stat. Ch. 256B (Medical Assistance for Needy Persons)
 Minn. Stat. Ch. 256L (MinnesotaCare)
 Minn. Stat. § 260B.171, Subds. 3 and 5 (Disposition Order and Peace Officer Records of Children)
 Minn. Stat. Ch. 260E (Reporting of Maltreatment of Minors)
 Minn. Stat. § 363A.42 (Public Records; Accessibility)
 Minn. Stat. § 480.40 (Personal Information, Dissemination)
 Minn. Stat. § 626.557 (Reporting of Maltreatment of Vulnerable Adults)
 Minn. Rules Parts 1205.0100-1205.2000 (Data Practices)
 10 U.S.C. § 503(b) and (c) (Enlistments: Recruiting Campaigns; Compilation of Directory Information)
 18 U.S.C. § 2331 (Definitions)
 18 U.S.C. § 2332b (Acts of Terrorism Transcending National Boundaries)
 20 U.S.C. § 1232g *et seq.* (Family Educational Rights and Privacy Act)
 20 U.S.C. § 6301 *et seq.* (Every Student Succeeds Act)
 20 U.S.C. § 7908 (Armed Forces Recruiting Information)
 20 U.S.C. § 7917 (Transfer of School Disciplinary Records)
 25 U.S.C. § 5304 (Definitions – Tribal Organization)
 26 U.S.C. §§ 151 and 152 (Internal Revenue Code)
 42 U.S.C. § 1711 *et seq.* (Child Nutrition Act)
 42 U.S.C. § 1751 *et seq.* (Richard B. Russell National School Lunch Act)
 34 C.F.R. §§ 99.1-99.67 (Family Educational Rights and Privacy)
 34 C.F.R. § 300.610-300.627 (Confidentiality of Information)
 42 C.F.R. § 2.1 *et seq.* (Confidentiality of Drug Abuse Patient Records)
Gonzaga University v. Doe, 536 U.S. 273 309 (2002)
 Dept. of Admin. Advisory Op. No. 21-008 (December 8, 2021)

Cross References: MSBA/MASA Model Policy 414 (Mandated Reporting of Child Neglect or Physical or Sexual Abuse)
 MSBA/MASA Model Policy 417 (Chemical Use and Abuse)
 MSBA/MASA Model Policy 506 (Student Discipline)
 MSBA/MASA Model Policy 519 (Interviews of Students by Outside Agencies)
 MSBA/MASA Model Policy 520 (Student Surveys)
 MSBA/MASA Model Policy 711 (Video Recording on School Buses)
 MSBA/MASA Model Policy 722 (Public Data Requests)
 MSBA/MASA Model Policy 906 (Community Notification of Predatory Offenders)
 MSBA School Law Bulletin "I" (School Records – Privacy – Access to Data)

PUBLIC NOTICE

Swan River Montessori Charter School gives notice to parents of students currently in attendance in Swan River Montessori School, and eligible students currently in attendance in Swan River Montessori School, of their rights regarding pupil records.

1. Parents and eligible students are hereby informed that they have the following rights:
 - a. That a parent or eligible student has a right to inspect and review the student's education records within 45 days after the day the request for access is received by SRMCS. A parent or eligible student should submit to SRMCS a written request to inspect education records which identify as precisely as possible the record or records he or she wishes to inspect. The parent or eligible student will be notified of the time and place where the records may be inspected;
 - b. That the parent or eligible student has a right to seek amendment of the student's education records to ensure that those records are not inaccurate, misleading, or otherwise in violation of the student's privacy rights. A parent or eligible student may ask SRMCS to amend a record that they believe is inaccurate or misleading. The request shall be in writing, identify the item the parent or eligible student believes to be inaccurate, misleading, or in violation of the privacy rights of the student, shall state the reason for this belief, and shall specify the correction the parent or eligible student wishes SRMCS to make. The request shall be signed by the parent or eligible student. If SRMCS decides not to amend the record as requested by the parent or eligible student, SRMCS will notify the parent or eligible student of the decision and advise him or her of the right to a hearing regarding the request for amendment. Additional information regarding the hearing procedures will be provided to the parent or eligible student when notified of the right to a hearing;
 - c. That the parent or eligible student has a right to consent to disclosures of personally identifiable information contained in the student's education records, except to the extent that federal and state law and the regulations promulgated thereunder authorize disclosures without consent;
 - d. That SRMCS may disclose education records to other school officials within SRMCS if SRMCS has determined they have legitimate educational interests. For purposes of such disclosure, a "school official" is a person employed by SRMCS as an administrator, supervisor, instructor, or support staff member (including health or medical staff and law enforcement unit personnel) or other employee; a person serving on the school board; a person or company with whom SRMCS has consulted to perform a specific task (such as an attorney, auditor, medical consultant, therapist, public information officer, or data practices compliance official); or a parent or student serving on an official committee, such as a disciplinary or grievance committee; or any individual assisting a school official in the performance of his or her tasks. A school official has a "legitimate educational interest" if the individual needs to review an education record in order to fulfill his or her professional responsibility and includes, but is not limited to, an interest directly related to classroom instruction, teaching, student achievement and progress, discipline of a student, and student health and welfare and the ability to respond to a request for

educational data;

- e. That SRMCS forwards education records on request to a school or post-secondary educational institution in which a student seeks or intends to enroll, or is already enrolled, as long as the disclosure is for purposes related to the student's enrollment, including information about disciplinary action taken as a result of any incident in which the student possessed or used a dangerous weapon, suspension and expulsion information pursuant to 20 U.S.C. § 7917, part of the federal Every Student Succeeds Act and data regarding a student's history of violent behavior,] and any disposition order which adjudicates the student as delinquent for committing an illegal act on SRMCS property and certain other illegal acts;
 - f. That the parent or eligible student has a right to file a complaint with the U.S. Department of Education regarding an alleged failure by SRMCS to comply with the requirements of 20 U.S.C. § 1232g and the rules promulgated thereunder. The name and address of the office that administers the Family Education Rights and Privacy Act is:

Family Policy Compliance Office
U.S. Department of Education
400 Maryland Avenue S.W.
Washington, D.C. 20202-8520
 - g. That the parent or eligible student has a right to obtain a copy of SRMCS's policy regarding the protection and privacy of pupil records; and
 - h. That copies of SRMCS's policy regarding the protection and privacy of school records are located in the school office.
- 2. Copies of the school board policy and accompanying procedures and regulations are available to parents and students upon written request to the director.
 - 3. Pursuant to applicable law, Swan River Montessori Charter School gives notice to parents of students currently in attendance in SRMCS, and eligible students currently in attendance in SRMCS, of their rights regarding "directory information."

"Directory information" includes the following information relating to a student: the student's name; photograph; date and place of birth; major field of study; dates of attendance; grade level; enrollment status; participation in officially recognized activities and sports; weight and height of members of athletic teams; degrees, honors and awards received; the most recent educational agency or institution attended by the student. "Directory information" also includes the name, address, and telephone number of the student's parent(s). "Directory information" does not include a student's social security number or a student's identification number (ID) if the ID may be used to access education records without use of one or more factors that authenticate the student's identity such as a personal identification number, password, or other

factor known or possessed only by the authorized user. It also does not include identifying information on a student's religion, race, color, social position, or nationality.

- a. THE INFORMATION LISTED ABOVE SHALL BE PUBLIC INFORMATION WHICH SRMCS MAY DISCLOSE FROM THE EDUCATION RECORDS OF A STUDENT OR INFORMATION REGARDING A PARENT.
 - b. SHOULD THE PARENT OF A STUDENT OR THE STUDENT SO DESIRE, ANY OR ALL OF THE LISTED INFORMATION WILL NOT BE DISCLOSED WITHOUT THE PARENT'S OR ELIGIBLE STUDENT'S PRIOR WRITTEN CONSENT EXCEPT TO SCHOOL OFFICIALS AS PROVIDED UNDER FEDERAL LAW.
 - c. IN ORDER TO MAKE ANY OR ALL OF THE DIRECTORY INFORMATION LISTED ABOVE "PRIVATE" (I.E., SUBJECT TO CONSENT PRIOR TO DISCLOSURE), THE PARENT OR ELIGIBLE STUDENT MUST MAKE A WRITTEN REQUEST TO THE BUILDING PRINCIPAL WITHIN THIRTY (30) DAYS AFTER THE DATE OF THE LAST PUBLICATION OF THIS NOTICE. THIS WRITTEN REQUEST MUST INCLUDE THE FOLLOWING INFORMATION:
 - (1) NAME OF STUDENT AND PARENT, AS APPROPRIATE;
 - (2) HOME ADDRESS;
 - (3) SCHOOL PRESENTLY ATTENDED BY STUDENT;
 - (4) PARENT'S LEGAL RELATIONSHIP TO STUDENT, IF APPLICABLE;
 - (5) SPECIFIC CATEGORY OR CATEGORIES OF DIRECTORY INFORMATION WHICH IS NOT TO BE MADE PUBLIC WITHOUT THE PARENT'S OR ELIGIBLE STUDENT'S PRIOR WRITTEN CONSENT.
4. Pursuant to applicable law, Swan River Montessori Charter School, hereby gives notice to parents of students and eligible students in grades 11 and 12 of their rights regarding release of information to military recruiting officers and post-secondary educational institutions. SRMCS must release the names, addresses, electronic mail address (which shall be the electronic mail addresses provided by SRMCS, if available, that may be released to military recruiters only), and home telephone numbers of students in grades 11 and 12 to military recruiting officers and post-secondary educational institutions within sixty (60) days after the date of the request. Data released to military recruiting officers under this provision may be used only for the purpose of providing information to students about military service, state and federal veterans' education benefits, and other career and educational opportunities provided by the military and cannot be further disseminated to any other person except personnel of the recruiting services of the armed forces

SHOULD THE PARENT OF A STUDENT OR THE ELIGIBLE STUDENT SO DESIRE, ANY OR ALL OF THE LISTED INFORMATION WILL NOT BE DISCLOSED TO MILITARY RECRUITING OFFICERS AND POST-SECONDARY EDUCATIONAL INSTITUTIONS WITHOUT PRIOR CONSENT.

IN ORDER TO REFUSE THE RELEASE OF THIS INFORMATION WITHOUT PRIOR CONSENT, THE PARENT OR ELIGIBLE STUDENT MUST MAKE A WRITTEN REQUEST TO THE RESPONSIBLE AUTHORITY, *[DESIGNATE TITLE OF INDIVIDUAL, I.E., BUILDING PRINCIPAL]*, BY *[INSERT DATE]* EACH YEAR. THIS WRITTEN REQUEST MUST INCLUDE THE FOLLOWING INFORMATION:

- (1) NAME OF STUDENT AND PARENT, AS APPROPRIATE;

- (2) HOME ADDRESS;
- (3) STUDENT'S GRADE LEVEL;
- (4) SCHOOL PRESENTLY ATTENDED BY STUDENT;
- (5) PARENT'S LEGAL RELATIONSHIP TO STUDENT, IF APPLICABLE;
- (6) SPECIFIC CATEGORY OR CATEGORIES OF INFORMATION WHICH ARE NOT TO BE RELEASED TO MILITARY RECRUITING OFFICERS AND POST-SECONDARY EDUCATIONAL INSTITUTIONS WITHOUT PRIOR CONSENT;
- (7) SPECIFIC CATEGORY OR CATEGORIES OF DIRECTORY INFORMATION WHICH ARE NOT TO BE RELEASED TO THE PUBLIC, INCLUDING MILITARY RECRUITING OFFICERS AND POST-SECONDARY EDUCATIONAL INSTITUTIONS.

Notice: Refusal to release the above information to military recruiting officers and post-secondary educational institutions alone does not affect SRMCS's release of directory information to the public, including military recruiting officers and post-secondary educational institutions. In order to make any directory information about a student private, the procedures contained in the Directory Information section of this notice also must be followed. If you do not want your child's or eligible student's directory information released to military recruiting officers or post-secondary educational institutions, you also must notify SRMCS that you do not want this directory information released to any member of the public, including military recruiting officers and post-secondary educational institutions.

Swan River Montessori Charter School, Monticello MN

Dated:_____

Chair

[Note: The use of this form requesting information about specific activities or behavior is mandated by statute. In addition, SRMCS is required to maintain such requests and a record of any release in the student's file.]

JUVENILE JUSTICE SYSTEM

REQUEST FOR INFORMATION

Family Educational Rights and Privacy Act

Minnesota Government Data Practices Act, Minn. Stat. § 13.32, Subds. 3(i) and 8(b)

DATE/TIME OF REQUEST: _____

TO: _____
(Director)

FROM: _____
(Requester's name/agency)

STUDENT: _____

BASIS FOR REQUEST:

_____ Juvenile delinquency investigation/prosecution

_____ Child protection assessment/investigation

_____ Investigation/filing of CHIPS or delinquency petition

REASON FOR REQUEST: (Requester must describe why information regarding existence of the data marked below is necessary to effectively serve the student)

RESPONSE TO REQUEST:

The school must indicate whether it has data on the student that document any activity or behavior marked by the requester.

INFORMATION REQUESTED: *(mark all that apply)* **RESPONSE PROVIDED:** *(yes / no)*

Indicate whether you have data that document the student's:

_____	Use of a controlled substance, alcohol, or tobacco	_____
_____	Assaultive or threatening conduct as defined in Minn. Stat. § 13.32, Subd. 8	_____
_____	Possession or use of weapons or look-alike weapons	_____
_____	Theft	_____
_____	Vandalism and damage to property	_____

CERTIFICATION: The undersigned certifies that he or she is a member of the juvenile justice system. The requested data are needed by the juvenile justice system so it may effectively serve, prior to adjudication, the student whose records are released. The undersigned will not disclose the information received to any other party, except as provided under state law, without prior written consent as required by Code of Federal Regulations, title 34, section 99.38(b). The undersigned further certifies that he or she understands that, by signing this request, he or she is subject to the penalties in Minn. Stat. § 13.09.

Date

Signature/Title

Appendix E



Minnesota Statutes, section 120B.31, subdivision 4a, requires the commissioner to create and publish a form for parents and guardians to complete if they refuse to have their student participate in state-required standardized assessments. Your student's district may require additional information. School districts must post this three-page form on the district website and include it in district student handbooks.

Parent/Guardian Refusal for Student Participation in Statewide Assessments

To opt out of statewide assessments, the parent/guardian must complete this form and return it to the student's school.

*To best support school district planning, please submit this form to the student's school no later than January 15 of the academic school year. For students who enroll after a statewide testing window begins, please submit the form within two weeks of enrollment. A new refusal form is required **each year** parents/guardians wish to opt the student out of statewide assessments.*

Date _____ (This form is **only** applicable for the 20____ to 20____ school year.)

Student's Legal First Name _____ Student's Legal Middle Initial _____

Student's Legal Last Name _____ Student's Date of Birth _____

Student's District/School _____ Grade _____

Please initial to indicate you have received and reviewed information about statewide testing.

_____ I received information on statewide assessments and choose to opt my student out. MDE provides the *Parent/Guardian Guide and Refusal for Student Participation in Statewide Testing* on the [MDE website](https://education.mn.gov/Students-and-Families/Programs-and-Initiatives/Statewide-Testing) ([education.mn.gov > Students and Families > Programs and Initiatives > Statewide Testing](https://education.mn.gov/Students-and-Families/Programs-and-Initiatives/Statewide-Testing)).

Reason for refusal:

Please indicate the statewide assessment(s) you are opting the student out of this school year:

_____ MCA/MTAS Reading

_____ MCA/MTAS Science

_____ MCA/MTAS Mathematics

_____ ACCESS/Alternate ACCESS for ELLs

Contact your school or district for the form to opt out of local assessments.

I understand that by signing this form, my school and I may lose valuable information about how well my student is progressing academically. As a result, my student will not receive an individual score. Refusing to participate in statewide assessments may impact the school, district, and state's efforts to equitably distribute resources and support student learning; for the purpose of school and district accountability calculations, my student will not be considered "proficient."

If my student is in high school, I understand that by signing this form my student will not have an MCA score that could potentially save time and money by not having to take remedial, non-credit courses at a Minnesota State college or university.

Parent/Guardian Name (print) _____

Parent/Guardian Signature _____

To be completed by school or district staff only.

Student ID or MARSS Number _____

Posted May 2019

Appendix F – Student Attendance

Swan River Montessori Charter School

Adopted: 2005

MSBA/MASA Model Policy 503 Charter

Revised: 1.20.26

Orig. 1995 (as ISD Policy)

Orig. 2022 (as Charter Policy) Rev. 2025

503 STUDENT ATTENDANCE

I. PURPOSE

- A. The Swan River Montessori Charter School (SRMCS) Board believes that regular school attendance is directly related to success in academic work, benefits students socially, provides opportunities for important communications between teachers and students, and establishes regular habits of dependability important to the future of the student. The purpose of this policy is to encourage regular school attendance. It is intended to be positive and not punitive.
- B. This policy also recognizes that class attendance is a joint responsibility to be shared by the student, parent or guardian, teacher, and administrators. This policy will assist students in attending class.

II. GENERAL STATEMENT OF POLICY

A. Responsibilities

1. Student's Responsibility

It is the student's right to be in school. It is also the student's responsibility to attend all assigned classes and study halls every day

that school is in session and to be aware of and follow the correct procedures when absent from an assigned class or study hall. Finally, it is the student's responsibility to request any missed assignments due to an absence.

2. Parent or Guardian's Responsibility

It is the responsibility of the student's parent or guardian to ensure the student is attending school, to inform the school in the event of a student absence, and to work cooperatively with the school and the student to solve any attendance problems that may arise.

3. Teacher's Responsibility

It is the teacher's responsibility to take daily attendance and to maintain accurate attendance records in each assigned class and study hall. It is also the teacher's responsibility to be familiar with all procedures governing attendance and to apply these procedures uniformly. It is also the teacher's responsibility to provide any student who has been absent with any missed assignments upon request. Finally, it is the teacher's responsibility to work cooperatively with the student's parent or guardian and the student to solve any attendance problems that may arise.

4. School Director's Responsibilities

- a. It is the School Director, or designee's responsibility to require students to attend all assigned classes and study halls. It is also the School Director's responsibility to be familiar with all procedures governing attendance and to apply these procedures uniformly to all students, to maintain accurate records on student attendance, and to prepare a list of the previous day's absences stating the status of each. Finally, it is the School Director, or designee's, responsibility to inform the student's parent or guardian of the student's attendance and to work cooperatively with them and the student to solve attendance problems.
- b. In accordance with the Minnesota Compulsory Instruction Law, Minnesota Statutes, section 120A.22, the students of SRMCS are REQUIRED to attend all assigned classes and/or study halls every day school is in session, unless the student has been

excused by the SRMCS School Board from attendance because the student has already completed state and charter school standards required to graduate from high school, has withdrawn, or has a valid excuse for absence.

B. Attendance Procedures

Attendance procedures shall be presented to the charter school board for review and approval. When approved by the school board, the attendance procedures will be included as an addendum to this policy.

1. Excused Absences

a. A parent, guardian, or other person having control of a child may apply to a charter school to have the child excused from attendance for the whole or any part of the time school is in session during any school year. Application may be made to a truant officer or the school official designated by the principal. A note from a physician or a licensed mental health professional stating that the child cannot attend school is a valid excuse.

b. To be considered an excused absence, the student's parent or legal guardian may be asked to verify, in writing, the reason for the student's absence from school. A note from a physician or a licensed mental health professional stating that the student cannot attend school is a valid excuse.

c. Legitimate Exceptions

The following reasons shall be sufficient to constitute excused absences:

(1) that the child's physical or mental health is such as to prevent attendance at school or application to study for the period required, which includes:

(a) child illness, medical, dental, orthodontic, or counseling appointments; including appointments conducted through telehealth;

(b) family emergencies;

(c) the death or serious illness or funeral of an immediate family member;

- (d) active duty in any military branch of the United States;
 - (e) the child has a condition that requires ongoing treatment for a mental health diagnosis; or
 - (f) other exemptions included in this attendance policy.
- (2) that the child has already completed state and charter school standards required for graduation from high school; or
- (3) that it is the wish of the parent, guardian, or other person having control of the child, that the child attend for a period or periods not exceeding in the aggregate three hours in any week, instruction conducted by a Tribal spiritual or cultural advisor, or a school for religious instruction conducted and maintained by a church, or association of churches, or any Sunday school association incorporated under the laws of this state, or any auxiliary thereof. This instruction must be conducted and maintained in a place other than a public school building, and it must not, in whole or in part, be conducted and maintained at public expense. A child may be absent from school on days that the child attends upon instruction according to this clause.

c. Consequences of Excused Absences

- (1) Students whose absences are excused are required to make up all assignments missed or to complete alternative assignments as deemed appropriate by the classroom teacher.
- (2) Work missed because of absence must be made up within 5 days from the date of the student's return to school. Any work not completed within this period shall result in "no credit" for the missed assignment. However, the director or the classroom teacher may extend the

time allowed for completion of make-up work in the case of an extended illness or other extenuating circumstances.

2. Unexcused Absences

a. The following are examples of absences which will not be excused:

- (1) Truancy. An absence by a student which was not approved by the parent and/or SRMCS.
- (2) Any absence in which the student failed to comply with any reporting requirements of SRMCS's attendance procedures.
- (3) Work at home.
- (4) Work at a business, except under a school-sponsored work release program.
- (5) Vacations with family.
- (6) Personal trips to schools or colleges.
- (7) Absences resulting from cumulated unexcused tardies 3 tardies equal one (1) unexcused absence).
- (8) Any other absence not included under the attendance procedures set out in this policy.

b. Consequences of Unexcused Absences

- (1) Absences resulting from official suspension will be handled in accordance with the Pupil Fair Dismissal Act, Minnesota Statutes, sections 121A.40-121A.56.
- (2) Days during which a student is suspended from school shall not be counted in a student's total cumulated unexcused absences.
- (3) In cases of recurring unexcused absences, the administration may also request the county attorney to file a petition with the juvenile court, pursuant to Minnesota statutes.

C. Tardiness

1. Definition

Students are expected to be in their assigned area at designated times. Failures to do so constitute tardiness.

2. Procedures for Reporting Tardiness

- a. Students tardy at the start of school must report to the school office for an admission slip.
- b. Tardiness between periods will be handled by the teacher.

3. Excused Tardiness

Valid excuses for tardiness are:

- a. Illness.
- b. Serious illness in the student's immediate family.
- c. A death or funeral in the student's immediate family or of a close friend or relative.
- d. Medical, dental, orthodontic, or mental health treatment.
- e. Court appearances occasioned by family or personal action.
- f. Physical emergency conditions such as fire, flood, storm, etc.
- g. Any tardiness for which the student has been excused in writing by an administrator or staff member.

4. Unexcused Tardiness

- a. An unexcused tardiness is failing to be in an assigned area at the designated time class period commences without a valid excuse.
- b. Consequences of tardiness may include detention after 12 unexcused tardies. In addition, 3 unexcused tardies are equivalent to one unexcused absence.

D. Participation in Extracurricular Activities and School-Sponsored On-the-Job Training Programs

1. This policy applies to all students involved in any extracurricular activity scheduled either during or outside the school day and any school-sponsored on-the-job training programs.
2. School-initiated absences will be accepted and participation permitted.
3. A student may not participate in any activity or program if he or she has an unexcused absence from any class during the day.
4. If a student is suspended from any class, he or she may not participate in any activity or program that day.
5. If a student is absent from school due to medical reasons, he or she must present a physician's statement or a statement from the student's parent or guardian clearing the student for participation that day. The note must be presented to the coach or advisor before the student participates in the activity or program.

III. RELIGIOUS AND CULTURAL OBSERVANCE ACCOMMODATION

Reasonable efforts will be made by the charter school to accommodate any student who wishes to be excused from a curricular activity for a religious or cultural observance as provided under Policy 609. Requests for accommodation should be directed to the building principal.

IV. DISSEMINATION OF POLICY

- A. Copies of this policy shall be made available to all students and parents at the commencement of each school year via the SRMCS website at www.swanrivermontessori.org. This policy shall also be available upon request in the office.
- B. The charter school will provide annual notice to parents of the charter school's policy relating to a student's absence from school for religious observance.

V. REQUIRED REPORTING

A. Continuing Truant

Minnesota Statutes, section 260A.02 provides that a continuing truant is a student who is subject to the compulsory instruction requirements of Minnesota Statutes, section 120A.22 and is absent from instruction in a school, as defined in Minnesota Statutes, section 120A.05, without valid excuse within a single school year for:

1. Three (3) days if the child is in elementary school; or
2. Three or more class periods on three (3) days if the child is in middle school, junior high school, or high school.

B. Reporting Responsibility

When a student is initially classified as a continuing truant, Minnesota Statutes, section 260A.03 provides that the school attendance officer or other designated school official shall notify the student's parent or legal guardian, by first class mail or other reasonable means, of the following:

1. That the child is truant;
2. That the parent or guardian should notify the school if there is a valid excuse for the child's absences;
3. That the parent or guardian is obligated to compel the attendance of the child at school pursuant to Minnesota Statutes, section 120A.22 and parents or guardians who fail to meet this obligation may be subject to prosecution under Minnesota Statutes, section 120A.34;
4. That this notification serves as the notification required by Minnesota Statutes, section 120A.34;
5. That alternative educational programs and services may be available in the child's enrolling or resident district;
6. That the parent or guardian has the right to meet with appropriate school personnel to discuss solutions to the child's truancy;

7. That if the child continues to be truant, the parent and child may be subject to juvenile court proceedings under Minnesota Statutes, chapter 260C;
8. That if the child is subject to juvenile court proceedings, the child may be subject to suspension, restriction, or delay of the child's driving privilege pursuant to Minnesota Statutes, section 260C.201; and
9. It is recommended that the parent or guardian accompany the child to school and attend classes with the child for one (1) day.

C. Habitual Truant

1. A habitual truant is a child under the age of seventeen (17) years who is absent from attendance at school without lawful excuse for seven (7) school days per school year if the child is in elementary school or for one or more class periods on seven (7) school days per school year if the child is in middle school, junior high school, or high school, or a child who is seventeen (17) years of age who is absent from attendance at school without lawful excuse for one or more class periods on seven (7) school days per school year and who has not lawfully withdrawn from school.
2. A charter school attendance officer shall refer a habitual truant child and the child's parent or legal guardian to appropriate services and procedures, under Minnesota Statutes, chapter 260A.

Legal References: Minn. Stat. § 120A.05 (Definitions)
Minn. Stat. § 120A.22 (Compulsory Instruction)
Minn. Stat. § 120A.24 (Reporting)
Minn. Stat. § 120A.26 (Enforcement and Prosecution)
Minn. Stat. § 120A.34 (Violations; Penalties)
Minn. Stat. § 120A.35 (Absence from School for Religious Observance)
Minn. Stat. §§ 121A.40-121A.56 (Pupil Fair Dismissal Act)
Minn. Stat. § 124E.03, Subd. 2(g) and (j) (Applicable Law)
Minn. Stat. § 260A.02 (Definitions)
Minn. Stat. § 260A.03 (Notice to Parent or Guardian When Child is a Continuing Truant)
Minn. Stat. § 260C.007, Subd. 19 (Habitual Truant Defined)
Minn. Stat. § 260C.201 (Dispositions; Children in Need of Protection or Services or Neglected and in Foster Care)

Goss v. Lopez, 419 U.S. 565 (1975)
Slocum v. Holton Bd. of Educ., 429 N.W.2d 607 (Mich. App. Ct. 1988)
Campbell v. Bd. of Educ. of New Milford, 475 A.2d 289 (Conn. 1984)
Hamer v. Bd. of Educ. of Twp. High Sch. Dist. No. 113, 66 Ill. App.3d 7, 383 N.E.2d 231 (1978)
Gutierrez v. Sch. Dist. R-1, 585 P.2d 935 (Co. Ct. App. 1978)
Knight v. Bd. of Educ., 38 Ill. App. 3d 603, 348 N.E.2d 299 (1976)
Dorsey v. Bale, 521 S.W.2d 76 (Ky. 1975)

Cross References: MSBA/MASA Model Policy 506 (Student Discipline)

NOTE: The School Director reserves the right to address student attendance at any time for any reason. Any attendance issues/concerns that arise and do not fit within the policy guidelines as stated above will be dealt with on a case by case basis, if deemed necessary by the Director.

Appendix G – Bullying Prohibition

Swan River Montessori Charter School

Adopted: 8.29.05

MSBA/MASA Model Policy 514 Charter

Orig. 2022 (as Charter Policy)

Revised: 4.13.26

Rev. 2024

514 BULLYING PROHIBITION POLICY

I. PURPOSE

A safe and civil environment is needed for students to learn and attain high academic standards and to promote healthy human relationships. Bullying, like other violent or disruptive behavior, is conduct that interferes with students' ability to learn and teachers' ability to educate students in a safe environment. Swan River Montessori Charter Montessori School (SRMCS) cannot monitor the activities of students at all times and eliminate all incidents of bullying between students, particularly when students are not under the direct supervision of school personnel. However, to the extent such conduct affects the educational environment of SRMCS and the rights and welfare of its students and is within the control of the SRMCS in its normal operations, it is SRMCS's intent to prevent bullying and to take action to investigate, respond to, and to remediate and discipline for those acts of bullying which have not been successfully prevented. The purpose of this policy is to assist SRMCS in its goal of preventing and responding to acts of bullying, intimidation, violence, reprisal, retaliation, and other similar disruptive and detrimental behavior.

II. GENERAL STATEMENT OF POLICY

- A. An act of bullying, by either an individual student or a group of students, is expressly prohibited:
 - 1. on SRMCS property or at school-related premises, at the school functions or activities, on the school transportation;
 - 2. by the use of electronic technology and communications on the school premises, during the school functions or activities, on the school transportation, or on the school computers, networks, forums, and mailing lists; or
 - 3. by use of electronic technology and communications off the school premises to the extent such use substantially and materially disrupts student learning or the school environment.
- B. A school-aged child who voluntarily participates in a public school activity, such as a cocurricular or extracurricular activity, is subject to the policy provisions applicable to the public school students participating in the activity.
- C. This policy applies not only to students who directly engage in an act of bullying but also to students who, by their indirect behavior, condone or support another student's act of bullying. This policy also applies to any student whose conduct at any time or in any place constitutes bullying or other prohibited conduct that interferes with or obstructs the mission or operations of SRMCS or the safety or welfare of the student or other students, or materially and substantially interferes with a student's educational opportunities or performance or ability to participate in school functions or activities or

receive school benefits, services, or privileges. This policy also applies to an act of cyberbullying regardless of whether such act is committed on or off charter school property and/or with or without the use of charter school resources. This policy also applies to sexual exploitation.

- D. Malicious and sadistic conduct involving race, color, creed, national origin, sex, age, marital status, status with regard to public assistance, disability, religion, sexual harassment, and sexual orientation and gender identity as defined in Minnesota Statutes, chapter 363A is prohibited. This prohibition applies to students, independent contractors, teachers, administrators, and other school personnel.

Malicious and sadistic conduct and sexual exploitation by a charter school or school staff member, independent contractor, or enrolled student against a staff member, independent contractor, or student that occurs as described in Article II.A above is prohibited.

- E. No teacher, administrator, volunteer, contractor, or other employee of the charter school shall permit, condone, or tolerate bullying.
- F. Apparent permission or consent by a student being bullied does not lessen or negate the prohibitions contained in this policy.
- G. Retaliation against a victim, good faith reporter, or a witness of bullying is prohibited.
- H. False accusations or reports of bullying against another student are prohibited.
- I. A person who engages in an act of bullying, reprisal, retaliation, or false reporting of bullying or permits, condones, or tolerates bullying shall be subject to discipline or other remedial responses for that act in accordance with SRMCS's policies and procedures SRMCS may take into account the following factors:
 - 1. The developmental ages and maturity levels of the parties involved;
 - 2. The levels of harm, surrounding circumstances, and nature of the behavior;
 - 3. Past incidences or past or continuing patterns of behavior;
 - 4. The relationship between the parties involved; and
 - 5. The context in which the alleged incidents occurred.

Consequences for students who commit prohibited acts of bullying may range from remedial responses or positive behavioral interventions up to and including suspension and/or expulsion. The charter school shall employ research-based developmentally appropriate best practices that include preventative and remedial measures and effective discipline for deterring violations of this policy, apply throughout the charter school, and foster student, parent, and community participation.

Consequences for employees who permit, condone, or tolerate bullying or engage in an act of reprisal or intentional false reporting of bullying may result in disciplinary action up to and including termination or discharge.

Consequences for other individuals engaging in prohibited acts of bullying may include, but not be limited to, exclusion from SRMCS property and events and/or termination of services and/or contracts.

SRMCS will act to investigate all complaints of bullying reported to the charter school and will discipline or take appropriate action against any student, teacher, administrator, volunteer, contractor, or other employee of SRMCS who is found to have violated this policy.

III. DEFINITIONS

For purposes of this policy, the definitions included in this section apply.

- A. "Bullying" means intimidating, threatening, abusive, or harming conduct that is objectively offensive and:
1. an actual or perceived imbalance of power exists between the student engaging in the prohibited conduct and the target of the prohibited conduct, and the conduct is repeated or forms a pattern; or
 2. materially and substantially interferes with a student's educational opportunities or performance or ability to participate in school functions or activities or receive school benefits, services, or privileges.

The term "bullying" specifically includes cyberbullying, malicious and sadistic conduct, and sexual exploitation.

- B. "Cyberbullying" means bullying using technology or other electronic communication, including, but not limited to, a transfer of a sign, signal, writing, image, sound, or data, including a post on a social network Internet website or forum, transmitted through a computer, cell phone, or other electronic device. The term applies to prohibited conduct which occurs on school premises, on charter school property, at school functions or activities, on school transportation, or on school computers, networks, forums, and mailing lists, or off school premises to the extent that it substantially and materially disrupts student learning or the school environment.
- C. "Immediately" means as soon as possible but in no event longer than 24 hours.
- D. "Intimidating, threatening, abusive, or harming conduct" means, but is not limited to, conduct that does the following:
1. Causes physical harm to a student or a student's property or causes a student to be in reasonable fear of harm to person or property;
 2. Under Minnesota common law, violates a student's reasonable expectation of privacy, defames a student, or constitutes intentional infliction of emotional distress against a student; or
 3. Is directed at any student or students, including those based on a person's actual or perceived race, ethnicity, color, creed, religion, national origin, immigration status, sex, marital status, familial status, socioeconomic status, physical appearance, sexual orientation including gender identity and expression, academic status related to student performance, disability, or status with regard to public assistance, age, or any additional characteristic defined in the Minnesota Human Rights Act (MHRA). However, prohibited conduct need not be based on any particular characteristic defined in this paragraph or the MHRA.

- E. "Malicious and sadistic conduct" means creating a hostile learning environment by acting with the intent to cause harm by intentionally injuring another without just cause or reason or engaging in extreme or excessive cruelty or delighting in cruelty.
- F. "On school premises, on charter school property, at school functions or activities, or on school transportation" means all SRMCS buildings, school grounds, and school property or property immediately adjacent to school grounds, school bus stops, school buses, school vehicles, school contracted vehicles, or any other vehicles approved for SRMCS purposes, the area of entrance or departure from school grounds, premises, or events, and all school-related functions, school-sponsored activities, events, or trips. SRMCS property also may mean a student's walking route to or from school for purposes of attending school or school-related functions, activities, or events. While prohibiting bullying at these locations and events, SRMCS does not represent that it will provide supervision or assume liability at these locations and events.
- G. "Prohibited conduct" means bullying, cyberbullying, malicious and sadistic conduct, sexual exploitation, or retaliation or reprisal for asserting, alleging, reporting, or providing information about such conduct or knowingly making a false report about prohibited conduct.
- H. "Remedial response" means a measure to stop and correct prohibited conduct, prevent prohibited conduct from recurring, and protect, support, and intervene on behalf of a student who is the target or victim of prohibited conduct.
- I. "Student" means a student enrolled in a charter school.

IV. REPORTING PROCEDURE

- A. Any person who believes he or she has been the target or victim of bullying or any person with knowledge or belief of conduct that may constitute bullying or prohibited conduct under this policy shall report the alleged acts immediately to an appropriate official SRMCS designated by this policy. A person may report bullying anonymously. However, the charter school may not rely solely on an anonymous report to determine discipline or other remedial responses.
- B. SRMCS encourages the reporting party or complainant to use the report form available from the principal or building supervisor of each building or available in the charter school office, but oral reports shall be considered complaints as well.
- C. The Director is the person responsible for receiving reports of bullying or other prohibited conduct at the building level. Any person may report bullying or other prohibited conduct directly to the Director. If the complaint involves the building report taker, the complaint shall be made or filed directly with the executive director or the charter school human rights consultant by the reporting party or complainant.

The building report taker shall ensure that this policy and its procedures, practices, consequences, and sanctions are fairly and fully implemented and shall serve as the primary contact on policy and procedural matters. The building report taker or a third party designated by the charter school shall be responsible for the investigation. The building report taker shall provide information about available community resources to the target or victim of the bullying or other prohibited conduct, the perpetrator, and other affected individuals as appropriate.

- D. A teacher, school administrator, volunteer, contractor, or other school employee shall be particularly alert to possible situations, circumstances, or events that might include bullying. Any such person who witnesses, observes, receives a report of, or has other knowledge or belief of conduct that may constitute bullying or other prohibited conduct shall make reasonable efforts to address and resolve the bullying or prohibited conduct and shall inform the Director immediately. Charter school personnel who fail to inform the building report taker of conduct that may constitute bullying or other prohibited conduct or who fail to make reasonable efforts to address and resolve the bullying or prohibited conduct in a timely manner may be subject to disciplinary action.
- E. Reports of bullying or other prohibited conduct are classified as private educational and/or personnel data and/or confidential investigative data and will not be disclosed except as permitted by law. The building report taker, in conjunction with the responsible authority, shall be responsible for keeping and regulating access to any report of bullying and the record of any resulting investigation.
- F. Submission of a good faith complaint or report of bullying or other prohibited conduct will not affect the complainant's or reporter's future employment, grades, work assignments, or educational or work environment.
- G. SRMCS will respect the privacy of the complainant(s), the individual(s) against whom the complaint is filed, and the witnesses as much as possible, consistent with SRMCS' obligation to investigate, take appropriate action, and comply with any legal disclosure obligations.

V. CHARTER SCHOOL ACTION

- A. Within three school days of the receipt of a complaint or report of bullying or other prohibited conduct, SRMCS shall undertake or authorize an investigation by SRMCS officials or a third party designated by SRMCS.
- B. SRMCS may take immediate steps, at their discretion, to protect the target or victim of the bullying or other prohibited conduct, the complainant, the reporter, and students or others, pending completion of an investigation of the bullying or other prohibited conduct, consistent with applicable law.
- C. The alleged perpetrator of the bullying or other prohibited conduct shall be allowed the opportunity to present a defense during the investigation or prior to the imposition of discipline or other remedial responses.
- D. Upon completion of an investigation that determines that bullying or other prohibited conduct has occurred, the charter school will take appropriate action. Such action may include, but is not limited to, warning, suspension, exclusion, expulsion, transfer, remediation, termination, or discharge. Disciplinary consequences will be sufficiently severe to try to deter violations and to appropriately discipline prohibited conduct. Remedial responses to the bullying or other prohibited conduct shall be tailored to the particular incident and nature of the conduct and shall take into account the factors specified in Section II.F. of this policy. Charter school action taken for violation of this policy will be consistent with the requirements of applicable collective bargaining agreements; applicable statutory authority, including the Minnesota Pupil Fair Dismissal Act; the student discipline policy and other applicable charter school policies; and applicable regulations.

- E. SRMCS is not authorized to disclose to a victim private educational or personnel data regarding an alleged perpetrator who is a student or employee of SRMCS. School officials will notify the parent(s) or guardian(s) of students who are targets of bullying or other prohibited conduct and the parent(s) or guardian(s) of alleged perpetrators of bullying or other prohibited conduct who have been involved in a reported and confirmed bullying incident of the remedial or disciplinary action taken, to the extent permitted by law.
- F. In order to prevent or respond to bullying or other prohibited conduct committed by or directed against a child with a disability, the charter school shall, when determined appropriate by the child's individualized education program (IEP) team or Section 504 team, allow the child's IEP or Section 504 plan to be drafted to address the skills and proficiencies the child needs as a result of the child's disability to allow the child to respond to or not to engage in bullying or other prohibited conduct.

VI. RETALIATION OR REPRISAL

SRMCS will discipline or take appropriate action against any student, teacher, administrator, volunteer, contractor, or other employee of SRMCS who commits an act of reprisal or who retaliates against any person who asserts, alleges, or makes a good faith report of alleged bullying or prohibited conduct, who provides information about bullying or prohibited conduct, who testifies, assists, or participates in an investigation of alleged bullying or prohibited conduct, or who testifies, assists, or participates in a proceeding or hearing relating to such bullying or prohibited conduct. Retaliation includes, but is not limited to, any form of intimidation, reprisal, harassment, or intentional disparate treatment. Disciplinary consequences will be sufficiently severe to deter violations and to appropriately discipline the individual(s) who engaged in the prohibited conduct. Remedial responses to the prohibited conduct shall be tailored to the particular incident and nature of the conduct and shall take into account the factors specified in Section II.F. of this policy.

VII. TRAINING AND EDUCATION

- A. SRMCS annually will provide information and any applicable training to SRMCS staff regarding this policy.
- B. Consistent with its applicable policies and practice, the charter school must discuss this policy with students, school personnel and volunteers and provide appropriate training for all charter school personnel to prevent, identify, and respond to prohibited conduct. The charter school shall establish a training cycle for school personnel to occur during a period not to exceed every three (3) school years. Newly employed school personnel must receive the training within the first year of their employment with the charter school. The charter school or a school administrator may accelerate the training cycle or provide additional training based on a particular need or circumstance. This policy shall be included in employee handbooks, training materials, and publications on school rules, procedures, and standards of conduct, which materials shall also be used to publicize this policy.
- C. The charter school shall require ongoing professional development, consistent with Minnesota Statutes, section 122A.60, to build the skills of all school personnel who

regularly interact with students to identify, prevent, and appropriately address bullying and other prohibited conduct. Such professional development includes, but is not limited to, the following:

1. Developmentally appropriate strategies both to prevent and to immediately and effectively intervene to stop prohibited conduct;
 2. The complex dynamics affecting a perpetrator, target, and witnesses to prohibited conduct;
 3. Research on prohibited conduct, including specific categories of students at risk for perpetrating or being the target or victim of bullying or other prohibited conduct in school;
 4. The incidence and nature of cyberbullying; and
 5. Internet safety and cyberbullying.
- D. The charter school annually will provide education and information to students regarding bullying, including information regarding this SRMCS policy prohibiting bullying, the harmful effects of bullying, and other applicable initiatives to prevent bullying and other prohibited conduct.
- E. The administration of SRMCS may implement programs and other initiatives to prevent bullying, to respond to bullying in a manner that does not stigmatize the target or victim, and to make resources or referrals to resources available to targets or victims of bullying
- F. The administration is encouraged to provide developmentally appropriate instruction and is directed to review programmatic instruction to determine if adjustments are necessary to help students identify and prevent or reduce bullying and other prohibited conduct, to value diversity in school and society, to develop and improve students' knowledge and skills for solving problems, managing conflict, engaging in civil discourse, and recognizing, responding to, and reporting bullying or other prohibited conduct, and to make effective prevention and intervention programs available to students.

The administration must establish strategies for creating a positive school climate and use evidence-based social-emotional learning to prevent and reduce discrimination and other improper conduct.

The administration is encouraged, to the extent practicable, to take such actions as it may deem appropriate to accomplish the following:

1. Engage all students in creating a safe and supportive school environment;
2. Partner with parents and other community members to develop and implement prevention and intervention programs;
3. Engage all students and adults in integrating education, intervention, and other remedial responses into the school environment;
4. Train student bystanders to intervene in and report incidents of bullying and other prohibited conduct to the school's primary contact person;
5. Teach students to advocate for themselves and others;

6. Prevent inappropriate referrals to special education of students who may engage in bullying or other prohibited conduct; and
 7. Foster student collaborations that, in turn, foster a safe and supportive school climate.
- G. The charter school may implement violence prevention and character development education programs to prevent or reduce policy violations. Such programs may offer instruction on character education including, but not limited to, character qualities such as attentiveness, truthfulness, respect for authority, diligence, gratefulness, self-discipline, patience, forgiveness, respect for others, peacemaking, and resourcefulness.
- H. The charter school shall inform affected students and their parents of rights they may have under state and federal data practices laws to obtain access to data related to an incident and their right to contest the accuracy or completeness of the data. The charter school may accomplish this requirement by inclusion of all or applicable parts of its protection and privacy of pupil records policy in the student handbook.

VIII. NOTICE

- A. The charter school will give annual notice of this policy to students, parents or guardians, and staff, and this policy shall appear in the student handbook.
- B. Article II, paragraph D, regarding malicious and sadistic conduct must be conspicuously posted throughout each school building, in the administrative offices of the charter school, and in the office of each school.
- C. This policy shall be conspicuously posted in the administrative offices of the charter school in summary form.
- D. This policy must be distributed to each charter school employee and independent contractor, if the contractor regularly interacts with students, at the time of employment with the charter school.
- E. Notice of the rights and responsibilities of students and their parents under this policy must be included in the student discipline policy distributed to parents at the beginning of each school year.
- F. This policy shall be available to all parents and other school community members in an electronic format in the languages appearing on the charter school's website, consistent with charter school policies and practices.
- H. The charter school shall provide an electronic copy of its most recently amended policy to the Commissioner of the Minnesota Department of Education.

IX. POLICY REVIEW

To the extent practicable, the school board shall, on a cycle consistent with other charter school policies, review and revise this policy. The policy shall be made consistent with Minnesota Statutes, sections 121A.031 and 121A.0312 and other applicable law. Revisions shall be made in consultation with students, parents, and community organizations.

Legal References: Minn. Stat. Ch. 13 (Minnesota Government Data Practices Act)
Minn. Stat. § 120A.05, Subds. 9, 11, 13, and 17 (Definitions)
Minn. Stat. § 120B.232 (Character Development Education)
Minn. Stat. § 121A.03 (Model Policy)
Minn. Stat. § 121A.031 (School Student Bullying Policy)
Minn. Stat. § 121A.0311 (Notice of the Rights and Responsibilities of Students and Parents under the Safe and Supportive Minnesota Schools Act)
Minn. Stat. § 121A.0312 (Malicious and Sadistic Conduct)
Minn. Stat. §§ 121A.40-121A.56 (Pupil Fair Dismissal Act)
Minn. Stat. § 121A.69 (Hazing Policy)
Minn. Stat. Ch. 124E (Charter Schools)
Minn. Stat. Ch. 363A (Minnesota Human Rights Act)
20 U.S.C. § 1232g *et seq.* (Family Educational Rights and Privacy Act)
34 C.F.R. §§ 99.1 - 99.67 (Family Educational Rights and Privacy)

Cross References: MSBA/MASA Model Policy 403 (Discipline, Suspension, and Dismissal of Charter School Employees)
MSBA/MASA Model Policy 413 (Harassment and Violence)
MSBA/MASA Model Policy 414 (Mandated Reporting of Child Neglect or Physical or Sexual Abuse)
MSBA/MASA Model Policy 415 (Mandated Reporting of Maltreatment of Vulnerable Adults)
MSBA/MASA Model Policy 423 (Employee-Student Relationships)
MSBA/MASA Model Policy 501 (School Weapons Policy)
MSBA/MASA Model Policy 506 (Student Discipline)
MSBA/MASA Model Policy 507 (Corporal Punishment and Prior Restraint)
MSBA/MASA Model Policy 515 (Protection and Privacy of Pupil Records)
MSBA/MASA Model Policy 521 (Student Disability Nondiscrimination)
MSBA/MASA Model Policy 522 (Title IX Sex Nondiscrimination Policy)
MSBA/MASA Model Policy 524 (Internet Acceptable Use and Safety Policy)
MSBA/MASA Model Policy 525 (Violence Prevention)
MSBA/MASA Model Policy 526 (Hazing Prohibition)
MSBA/MASA Model Policy 529 (Staff Notification of Violent Behavior by Students)
MSBA/MASA Model Policy 709 (Student Transportation Safety Policy)
MSBA/MASA Model Policy 711 (Video Recording on School Buses)
MSBA/MASA Model Policy 712 (Video Surveillance Other Than on Buses)

Appendix H – Harassment and Violence

Swan River Montessori Charter School

Adopted: August 29, 2005

Revised: 12.16.25

MSBA/MASA Model Policy 413 Charter

Orig. 2022 (as Charter Policy)

Rev. 2025

413 HARASSMENT AND VIOLENCE

I. PURPOSE

The purpose of this policy is to maintain a learning and working environment free from harassment and violence on the basis of race, color, creed, religion, national origin, sex, age, marital status, familial status, status with regard to public assistance, sexual orientation, or disability (Protected Class).

II. GENERAL STATEMENT OF POLICY

- A. The policy of the charter school is to maintain a learning and working environment free from harassment and violence on the basis of Protected Class. The school prohibits any form of harassment or violence on the basis of Protected Class.
- B. A violation of this policy occurs when any student, teacher, administrator, or other charter school personnel harasses a student, teacher, administrator, or other school personnel or group of students, teachers, administrators, or other school personnel through conduct or communication based on a person's Protected Class, as defined by this policy. (For purposes of this policy, school personnel include school board members, school employees, agents, volunteers, contractors, or persons subject to the supervision and control of the charter school.)
- C. A violation of this policy occurs when any student, teacher, administrator, or other charter school personnel inflicts, threatens to inflict, or attempts to inflict violence upon any student, teacher, administrator, or other school personnel or group of students, teachers, administrators, or other school personnel based on a person's Protected Class.

- D. The charter school will act to investigate all complaints, either formal or informal, verbal or written, of harassment or violence based on a person's Protected Class, and to discipline or take appropriate action against any student, teacher, administrator, or other school personnel found to have violated this policy.

III. DEFINITIONS

- A. "Assault" is:
 - 1. an act done with intent to cause fear in another of immediate bodily harm or death;
 - 2. the intentional infliction of or attempt to inflict bodily harm upon another; or
 - 3. the threat to do bodily harm to another with present ability to carry out the threat.
- B. "Harassment" prohibited by this policy consists of physical or verbal conduct, including, but not limited to, electronic communications, relating to an individual's or group of individuals' race, color, creed, religion, national origin, sex, age, marital status, familial status, status with regard to public assistance, sexual orientation, including gender identity or expression, or disability, when the conduct:
 - 1. has the purpose or effect of creating an intimidating, hostile, or offensive working or academic environment;
 - 2. has the purpose or effect of substantially or unreasonably interfering with an individual's work or academic performance; or
 - 3. otherwise adversely affects an individual's employment or academic opportunities.
- C. "Immediately" means as soon as possible but in no event longer than twenty-four (24) hours.
- D. Protected Classifications; Definitions
 - 1. "Disability" means, with respect to an individual who

- a. has a physical sensory or mental impairment that materially limits one or more major life activities of such individual;
 - b. has a record of such an impairment;
 - c. is regarded as having such an impairment; or
 - d. has an impairment that is episodic or in remission and would materially limit a major life activity when active.
- 2. “Familial status” means the condition of one or more minors having legal status or custody with:
 - a. the minor’s parent or parents or the minor’s legal guardian or guardians; or
 - b. the designee of the parent or parents or guardian or guardians with the written permission of the parent or parents or guardian or guardians. Familial status also means residing with and caring for one or more individuals who lack the ability to meet essential requirements for physical health, safety, or self-care because the individual or individuals are unable to receive and evaluate information or make or communicate decisions. The protections afforded against harassment or discrimination on the basis of family status apply to any person who is pregnant or is in the process of securing legal custody of an individual who has not attained the age of majority.
- 3. “Marital status” means whether a person is single, married, remarried, divorced, separated, or a surviving spouse and, in employment cases, includes protection against harassment or discrimination on the basis of the identity, situation, actions, or beliefs of a spouse or former spouse.
- 4. “National origin” means the place of birth of an individual or of any of the individual’s lineal ancestors.
- 5. “Sex” includes, but is not limited to, pregnancy, childbirth, and disabilities related to pregnancy or childbirth.
- 6. “Sexual orientation” means to whom someone is, or is perceived of as being, emotionally, physically, or sexually attracted to based on sex or gender identity. A person may be attracted to men, women, both,

neither, or to people who are genderqueer, androgynous, or have other gender identities.

7. “Status with regard to public assistance” means the condition of being a recipient of federal, state, or local assistance, including medical assistance, or of being a tenant receiving federal, state, or local subsidies, including rental assistance or rent supplements.
- E. “Remedial response” means a measure to stop and correct acts of harassment or violence, prevent acts of harassment or violence from recurring, and protect, support, and intervene on behalf of a student who is the target or victim of acts of harassment or violence.
- F. Sexual Harassment; Definition
1. Sexual harassment includes unwelcome sexual advances, requests for sexual favors, sexually motivated physical conduct, or other verbal or physical conduct or communication of a sexual nature when:
 - a. submission to that conduct or communication is made a term or condition, either explicitly or implicitly, of obtaining employment or an education; or
 - b. 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
 - c. 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.
 2. Sexual harassment may include, but is not limited to:
 - a. unwelcome verbal harassment or abuse;
 - b. unwelcome pressure for sexual activity;
 - c. unwelcome, sexually motivated, or inappropriate patting, pinching, or physical contact, other than necessary restraint of student(s) by teachers, administrators, or other charter school personnel to avoid physical harm to persons or property;

- d. unwelcome sexual behavior or words, including demands for sexual favors, accompanied by implied or overt threats concerning an individual's employment or educational status;
- e. unwelcome sexual behavior or words, including demands for sexual favors, accompanied by implied or overt promises of preferential treatment with regard to an individual's employment or educational status; or
- f. unwelcome behavior or words directed at an individual because of sexual orientation, including gender identity or expression.

G. Sexual Violence; Definition

1. Sexual violence is a physical act of aggression or force or the threat thereof that 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.
2. Sexual violence may include, but is not limited to:
 - a. touching, patting, grabbing, or pinching another person's intimate parts;
 - b. coercing, forcing, or attempting to coerce or force the touching of anyone's intimate parts;
 - c. coercing, forcing, or attempting to coerce or force sexual intercourse or a sexual act on another; or
 - d. threatening to force or coerce sexual acts, including the touching of intimate parts or intercourse, on another.

H. Violence; Definition

Violence prohibited by this policy is a physical act of aggression or assault upon another or group of individuals because of, or in a manner reasonably related to an individual's Protected Class.

IV. REPORTING PROCEDURES

- A. Any person who believes he or she has been the target or victim of harassment or violence on the basis of Protected Class by a student, teacher, administrator, or other charter school personnel, or any person with knowledge or belief of conduct which may constitute harassment or violence prohibited by this policy toward a student, teacher, administrator, or other school personnel or group of students, teachers, administrators, or other school personnel should report the alleged acts immediately to an appropriate school official designated by this policy. A person may report conduct that may constitute harassment or violence anonymously. However, the school may not rely solely on an anonymous report to determine discipline or other remedial responses.
- B. The charter school encourages the reporting party or complainant to use the report form available from the executive director, principal, or building supervisor or available from the school office, but oral reports shall be considered complaints as well.
- C. Nothing in this policy shall prevent any person from reporting harassment or violence directly to a charter school human rights officer or to the executive director. If the complaint involves the building report taker, the complaint shall be made or filed directly with the executive director or the school human rights officer by the reporting party or complainant.

D. In Each School Building

The executive director, building principal, the principal's designee, or the building supervisor (hereinafter the "building report taker") is the person responsible for receiving oral or written reports of harassment or violence prohibited by this policy at the building level. Any adult charter school personnel who receives a report of harassment or violence prohibited by this policy shall inform the building report taker immediately. If the complaint involves the building report taker, the complaint shall be made or filed directly with the executive director or the charter school human rights officer by the reporting party or complainant. The building report taker shall ensure that this policy and its procedures, practices, consequences, and sanctions are fairly and fully implemented and shall serve as a primary contact on policy and procedural matters.

- E. A teacher, school administrator, volunteer, contractor, or other school employee shall be particularly alert to possible situations, circumstances, or events that might include acts of harassment or violence. Any such person who witnesses, observes, receives a report of, or has other knowledge or belief of conduct that may constitute harassment or violence shall make reasonable efforts to address and resolve the harassment or violence and shall inform the building report taker immediately. Charter school personnel who fail to inform the building report taker of conduct that may constitute harassment or violence or who fail to make reasonable efforts to address and resolve the harassment or violence in a timely manner may be subject to disciplinary action.
- F. Upon receipt of a report, the building report taker must notify the charter school human rights officer immediately, without screening or investigating the report. The building report taker may request, but may not insist upon, a written complaint. A written statement of the facts alleged will be forwarded as soon as practicable by the building report taker to the human rights officer. If the report was given verbally, the building report taker shall personally reduce it to written form within twenty-four (24) hours and forward it to the human rights officer. Failure to forward any harassment or violence report or complaint as provided herein may result in disciplinary action against the building report taker.
- G. In the Charter School
- The charter school board hereby designates the School Director and/or the Operations Coordinator as the charter school human rights officer(s) to receive reports or complaints of harassment or violence prohibited by this policy. If the complaint involves a human rights officer, the complaint shall be filed directly with the executive director.¹
- H. The charter school shall conspicuously post the name of the human rights officer(s), 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

¹ In some charter schools the executive director may be the human rights officer. If so, an alternative individual should be designated by the charter school board.

(2) The Director is Annette Vemuri

Mailing address: 500 Maple Street Monticello MN 55362

Telephone number: 763-271-7926

Email address: director@swanrivermontessori.org

(3) The school board contact information is: Jana Evink, Board President

Mailing address: 500 Maple Street Monticello MN 55362

Telephone number: 763-271-7926

Email address: Janae@swanrivermontessori.org

- I. Submission of a good faith complaint or report of harassment or violence prohibited by this policy will not affect the complainant or reporter's future employment, grades, work assignments, or educational or work environment.
- J. Use of formal reporting forms is not mandatory.
- K. Reports of harassment or violence prohibited by this policy are classified as private educational and/or personnel data and/or confidential investigative data and will not be disclosed except as permitted by law.
- L. The charter school will respect the privacy of the complainant(s), the individual(s) against whom the complaint is filed, and the witnesses as much as possible, consistent with the school's legal obligations to investigate, to take appropriate action, and to comply with any discovery or disclosure obligations.
- M. Retaliation against a victim, good faith reporter, or a witness of violence or harassment is prohibited.
- N. False accusations or reports of violence or harassment against another person are prohibited.
- O. A person who engages in an act of violence or harassment, reprisal, retaliation, or false reporting of violence or harassment, or permits, condones, or tolerates violence or harassment shall be subject to discipline or other remedial responses for that act in accordance with the charter school's policies and procedures.

Consequences for students who commit, or are a party to, prohibited acts of violence or harassment or who engage in reprisal or intentional false reporting may range from remedial responses or positive behavioral interventions up to and including suspension and/or expulsion.

Consequences for employees who permit, condone, or tolerate violence or harassment or engage in an act of reprisal or intentional false reporting of violence or harassment may result in disciplinary action up to and including termination or discharge.

Consequences for other individuals engaging in prohibited acts of violence or harassment may include, but not be limited to, exclusion from charter school property and events and/or termination of services and/or contracts.

V. INVESTIGATION

- A. By authority of the charter school, the human rights officer, within three (3) days of the receipt of a report or complaint alleging harassment or violence prohibited by this policy, shall undertake or authorize an investigation. The investigation may be conducted by school officials or by a third party designated by the school.
- 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 charter school should consider the surrounding circumstances, the nature of the behavior, past incidents or past or continuing patterns of behavior, the relationships between the parties involved, and the context in which the alleged incidents occurred. Whether a particular action or incident constitutes a violation of this policy requires a determination based on all the facts and surrounding circumstances.
- D. In addition, the charter school may take immediate steps, at its discretion, to protect the target or victim, the complainant, and students, teachers, administrators, or other school personnel pending completion of an investigation of alleged harassment or violence prohibited by this policy.
- E. The alleged perpetrator of the act(s) of harassment or violence shall be allowed the opportunity to present a defense during the investigation or prior to the imposition of discipline or other remedial responses.

- F. The investigation will be completed as soon as practicable. The charter school human rights officer shall make a written report to the executive director upon completion of the investigation. If the complaint involves the executive director, the report may be filed directly with the school board. The report shall include a determination of whether the allegations have been substantiated as factual and whether they appear to be violations of this policy.

VI. CHARTER SCHOOL ACTION

- A. Upon completion of an investigation that determines a violation of this policy has occurred, the charter school will take appropriate action. Such action may include, but is not limited to, warning, suspension, exclusion, expulsion, transfer, remediation, termination, or discharge. Disciplinary consequences will be sufficiently severe to try to deter violations and to appropriately discipline prohibited behavior. School action taken for violation of this policy will be consistent with requirements of applicable collective bargaining agreements, Minnesota and federal law, and applicable school policies and regulations.
- B. The school is not authorized to disclose to a victim private educational or personnel data regarding an alleged perpetrator who is a student or employee of the charter school. School officials will notify the targets or victims and alleged perpetrators of harassment or violence, the parent(s) or guardian(s) of targets or victims of harassment or violence and the parent(s) or guardian(s) of alleged perpetrators of harassment or violence who have been involved in a reported and confirmed harassment or violence incident of the remedial or disciplinary action taken, to the extent permitted by law.
- C. In order to prevent or respond to acts of harassment or violence committed by or directed against a child with a disability, the school shall, where determined appropriate by the child's individualized education program (IEP) or Section 504 team, allow the child's IEP or Section 504 plan to be drafted to address the skills and proficiencies the child needs as a result of the child's disability to allow the child to respond to or not to engage in acts of harassment or violence.

VII. RETALIATION OR REPRISAL

The charter school will discipline or take appropriate action against any student, teacher, administrator, or other school personnel who commits an act of reprisal or who retaliates against any person who asserts, alleges, or makes a good faith report of alleged harassment or violence prohibited by this policy, who testifies, assists, or participates in an investigation of retaliation or alleged harassment or violence, or who testifies, assists, or participates in a proceeding or hearing relating to such harassment or violence. Retaliation includes, but is not limited to, any form of intimidation, reprisal, harassment, or intentional disparate treatment. Disciplinary consequences will be sufficiently severe to deter violations and to appropriately discipline the individual(s) who engaged in the harassment or violence. Remedial responses to the harassment or violence shall be tailored to the particular incident and nature of the conduct.

VIII. RIGHT TO ALTERNATIVE COMPLAINT PROCEDURES

These procedures do not deny the right of any individual to pursue other avenues of recourse which may include filing charges with the Minnesota Department of Human Rights or another state or federal agency, initiating civil action, or seeking redress under state criminal statutes and/or federal law.

IX. 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, chapter 260E may be applicable.
- B. Nothing in this policy will prohibit the charter school from taking immediate action to protect victims of alleged harassment, violence, or abuse.

X. DISSEMINATION OF POLICY AND TRAINING

- A. This policy shall be conspicuously posted throughout each charter school building in areas accessible to students and staff members.

- B. This policy shall be given to each school employee and independent contractor who regularly interacts with students at the time of initial employment with the school.
- C. This policy shall appear in the student handbook.
- D. The charter school will develop a method of discussing this policy with students and employees.
- E. The charter school may implement violence prevention and character development education programs to prevent and reduce policy violations. Such programs may offer instruction on character education including, but not limited to, character qualities such as attentiveness, truthfulness, respect for authority, diligence, gratefulness, self-discipline, patience, forgiveness, respect for others, peacemaking, resourcefulness, and/or sexual abuse prevention.
- F. This policy shall be reviewed at least annually for compliance with state and federal law.

[NOTE: The MDE model policy included X.F. State law does not mandate an annual review. School boards may determine whether to retain X.F.]

Legal References: Minn. Stat. § 120B.232 (Character Development Education)
Minn. Stat. § 120B.234 (Child Sexual Abuse Prevention Education)
Minn. Stat. § 121A.03, Subd. 2 (Sexual, Religious, and Racial Harassment and Violence Policy)
Minn. Stat. § 121A.031 (School Student Bullying Policy)
Minn. Stat. Ch. 363A (Minnesota Human Rights Act)
Minn. Stat. § 609.341 (Definitions)
Minn. Stat. Ch. 260E (Reporting of Maltreatment of Minors)
20 U.S.C. §§ 1681-1688 (Title IX of the Education Amendments of 1972)
29 U.S.C. § 621 *et seq.* (Age Discrimination in Employment Act)
29 U.S.C. § 794 (Section 504 of the Rehabilitation Act of 1973)
42 U.S.C. § 1983 (Civil Action for Deprivation of Rights)
42 U.S.C. § 2000d *et seq.* (Title VI of the Civil Rights Act of 1964)
42 U.S.C. § 2000e *et seq.* (Title VII of the Civil Rights Act)
42 U.S.C. § 12101 *et seq.* (Americans with Disabilities Act)

Cross References: MSBA/MASA Model Policy 102 (Equal Educational Opportunity)

MSBA/MASA Model Policy 401 (Equal Employment Opportunity)
MSBA/MASA Model Policy 402 (Disability Nondiscrimination Policy)
MSBA/MASA Model Policy 403 (Discipline, Suspension, and Dismissal of Charter School Employees)
MSBA/MASA Model Policy 406 (Public and Private Personnel Data)
MSBA/MASA Model Policy 414 (Mandated Reporting of Child Neglect or Physical or Sexual Abuse)
MSBA/MASA Model Policy 415 (Mandated Reporting of Maltreatment of Vulnerable Adults)
MSBA/MASA Model Policy 506 (Student Discipline)
MSBA/MASA Model Policy 514 (Bullying Prohibition Policy)
MSBA/MASA Model Policy 515 (Protection and Privacy of Pupil Records)
MSBA/MASA Model Policy 521 (Student Disability Nondiscrimination)
MSBA/MASA Model Policy 522 (Title IX Sex Nondiscrimination, Grievance Procedures and Process)
MSBA/MASA Model Policy 524 (Internet Acceptable Use and Safety Policy)
MSBA/MASA Model Policy 525 (Violence Prevention)
MSBA/MASA Model Policy 526 (Hazing Prohibition)
MSBA/MASA Model Policy 528 (Student Parental, Family, and Marital Status Nondiscrimination)

**SWAN RIVER MONTESSORI CHARTER SCHOOL
HARASSMENT AND VIOLENCE REPORT FORM**

General Statement of Policy Prohibiting Harassment and Violence

Swan River Montessori Charter School maintains a firm policy prohibiting all forms of discrimination. This policy strictly prohibits harassment or violence against students or employees or groups of students or employees on the basis of race, color, creed, religion, national origin, sex, age, marital status, familial status, status with regard to public assistance, sexual orientation, or disability (Protected Class). All persons are to be treated with respect and dignity. Harassment or violence on the basis of Protected Class by any pupil, teacher, administrator, or other school personnel, that create an intimidating, hostile, or offensive environment will not be tolerated under any circumstances.

Complainant _____

Home Address _____

Work Address _____

Home/Cell Phone _____ **Work Phone** _____

Date of Alleged Incident(s) _____

Basis of Alleged Harassment/Violence - circle as appropriate: race \ color \ creed \ religion \ national origin \ sex \ age \ marital status \ familial status \ status with regard to public assistance \ sexual orientation \ disability

Name of person you believe harassed or was violent toward you or another person or group.

If the alleged harassment or violence was toward another person or group, identify that person or group.

Describe the incident(s) as clearly as possible, including such things as: what force, if any, was used; any verbal statements (i.e., threats, requests, demands, etc.); what, if any, physical contact was involved; etc. (Attach additional pages if necessary.) _____

Where and when did the incident(s) occur? _____

List any witnesses who were present _____

This complaint is filed based on my honest belief that _____ has harassed or has been violent to me or to another person or group. I hereby certify that the information I have provided in this complaint is true, correct, and complete to the best of my knowledge and belief.

Complainant Signature

Date

Received by _____

Date

Appendix I – Hazing Prohibitions

Swan River Montessori Charter School

Adopted: 2005

MSBA/MASA Model Policy 526 Charter

Orig. 1997 (as ISD Policy)

Revised: 5.19.26

Orig. 2022 (as Charter Policy)

526 HAZING PROHIBITION

I. PURPOSE

The purpose of this policy is to maintain a safe learning environment for students and staff that is free from hazing. Hazing activities of any type are inconsistent with the educational goals of Swan River Montessori Charter School and are prohibited at all times.

II. GENERAL STATEMENT OF POLICY

- A. No student, teacher, administrator, volunteer, contractor, or other employee of the charter school shall plan, direct, encourage, aid, or engage in hazing.
- B. No teacher, administrator, volunteer, contractor, or other employee of the charter school shall permit, condone, or tolerate hazing.
- C. Apparent permission or consent by a person being hazed does not lessen the prohibitions contained in this policy.
- D. Retaliation against a victim, good faith reporter, or a witness of hazing is prohibited.
- E. False accusations or reports of hazing against a student, teacher, administrator, volunteer, contractor, or other employee are prohibited.
- F. A person who engages in an act of hazing, reprisal, retaliation, or false reporting of hazing or permits, condones, or tolerates hazing shall be subject to discipline or other remedial responses for that act in accordance with the charter school's policies and procedures.

Consequences for students who commit, tolerate, or are a party to prohibited acts of hazing may range from remedial responses or positive behavioral interventions up to and including suspension and/or expulsion.

Consequences for employees who permit, condone, or tolerate hazing or engage in an act of reprisal or intentional false reporting of hazing may result in disciplinary action up to and including termination or discharge.

Consequences for other individuals engaging in prohibited acts of hazing may include, but not be limited to, exclusion from charter school property and events and/or termination of services and/or contracts.

- G. This policy applies to hazing that occurs during and after school hours, on or off school premises or property, at school functions or activities, or on school transportation.
- H. A person who engages in an act that violates school policy or law in order to be initiated into or affiliated with a student organization shall be subject to discipline for that act.
- I. The charter school will act to investigate all complaints of hazing and will discipline or take appropriate action against any student, teacher, administrator, volunteer, contractor, or other employee of the charter school who is found to have violated this policy.

III. DEFINITIONS

- A. “Hazing” means committing an act against a student, or coercing a student into committing an act, that creates a substantial risk of harm to a person, in order for the student to be initiated into or affiliated with a student organization, or for any other school-related purpose. The term hazing includes, but is not limited to:
 - 1. Any type of physical brutality such as whipping, beating, striking, branding, electronic shocking, or placing a harmful substance on the body.
 - 2. Any type of physical activity such as sleep deprivation, exposure to weather, confinement in a restricted area, calisthenics, or other activity that subjects the student to an unreasonable risk of harm or that adversely affects the mental or physical health or safety of the student.
 - 3. Any activity involving the consumption of any alcoholic beverage, drug, tobacco product, or any other food, liquid, or substance that subjects

the student to an unreasonable risk of harm or that adversely affects the mental or physical health or safety of the student.

4. Any activity that intimidates or threatens the student with ostracism, that subjects a student to extreme mental stress, embarrassment, shame, or humiliation, that adversely affects the mental health or dignity of the student or discourages the student from remaining in school.
 5. Any activity that causes or requires the student to perform a task that involves violation of state or federal law or of charter school policies or regulations.
- B. “Immediately” means as soon as possible but in no event longer than 24 hours.
- C. “On school premises or charter school property, or at school functions or activities, or on school transportation” means all charter school buildings, school grounds, and school property or property immediately adjacent to school grounds, school bus stops, school buses, school vehicles, school contracted vehicles, or any other vehicles approved for charter school purposes, the area of entrance or departure from school grounds, premises, or events, and all school-related functions, school-sponsored activities, events, or trips. Charter school property also may mean a student’s walking route to or from school for purposes of attending school or school-related functions, activities, or events. While prohibiting hazing at these locations and events, the charter school does not represent that it will provide supervision or assume liability at these locations and events.
- D. “Remedial response” means a measure to stop and correct hazing, prevent hazing from recurring, and protect, support, and intervene on behalf of a student who is the target or victim of hazing.
- E. “Student” means a student enrolled in a public school or a charter school.
- F. “Student organization” means a group, club, or organization having students as its primary members or participants. It includes grade levels, classes, teams, activities, or particular school events. A student organization does not have to be an official school organization to come within the terms of this definition.

IV. REPORTING PROCEDURES

- A. Any person who believes he or she has been the target or victim of hazing or any person with knowledge or belief of conduct which may constitute hazing shall report the alleged acts immediately to an appropriate charter school official designated by this policy. A person may report hazing anonymously. However, the charter school may not rely solely on an anonymous report to determine discipline or other remedial responses.
- B. The charter school encourages the reporting party to use the report form available from the principal or building supervisor of each building or available from the charter school office, but oral reports shall be considered complaints as well.

The building principal, the principal's designee, or the building supervisor (hereinafter the "building report taker") is the person responsible for receiving reports of hazing at the building level. Any adult charter school personnel who receives a report of hazing prohibited by this policy shall inform the building report taker immediately. Any person may report hazing directly to a charter school human rights officer or to the executive director. If the complaint involves the building report taker, the complaint shall be made or filed directly with the executive director or the charter school human rights officer by the reporting party or complainant.

The building report taker shall ensure that this policy and its procedures, practices, consequences, and sanctions are fairly and fully implemented and shall serve as a primary contact on policy and procedural matters.

- C. A teacher, administrator, volunteer, contractor, and other school employees shall be particularly alert to possible situations, circumstances, or events which might include hazing. Any such person who witnesses, observes, receives a report of, or has other knowledge or belief of conduct which may constitute hazing shall make reasonable efforts to address and resolve the hazing and shall inform the building report taker immediately. Charter school personnel who fail to inform the building report taker of conduct that may constitute hazing or who fail to make reasonable efforts to address and resolve the hazing in a timely manner may be subject to disciplinary action.

- D. Submission of a good faith complaint or report of hazing will not affect the complainant or reporter's future employment, grades, work assignments, or educational or work environment.
- E. Reports of hazing are classified as private educational and/or personnel data and/or confidential investigative data and will not be disclosed except as permitted by law. The building report taker, in conjunction with the responsible authority, shall be responsible for keeping and regulating access to any report of hazing and the record of any resulting investigation.
- F. The charter school will respect the privacy of the complainant(s), the individual(s) against whom the complaint is filed, and the witnesses as much as possible, consistent with the charter school's legal obligations to investigate, to take appropriate action, and to comply with any discovery or disclosure obligations.

V. CHARTER SCHOOL ACTION

- A. Within three (3) days of the receipt of a complaint or report of hazing, the charter school shall undertake or authorize an investigation by charter school officials or a third party designated by the charter school.
- B. The building report taker or other appropriate charter school officials may take immediate steps, at their discretion, to protect the target or victim of the hazing, the complainant, the reporter, and students or others pending completion of an investigation of alleged hazing prohibited by this policy.
- C. The alleged perpetrator of the hazing shall be allowed the opportunity to present a defense during the investigation or prior to the imposition of discipline or other remedial responses.
- D. Upon completion of an investigation that determines hazing has occurred, the charter school will take appropriate action. Such action may include, but is not limited to, warning, suspension, exclusion, expulsion, transfer, remediation, termination, or discharge. Disciplinary consequences will be sufficiently severe to try to deter violations and to appropriately discipline prohibited behavior. Charter school action taken for violation of this policy will be consistent with the requirements of applicable collective bargaining agreements; applicable statutory authority, including the Minnesota Pupil Fair Dismissal Act; and applicable charter school policies and regulations.

- E. The charter school is not authorized to disclose to a victim private educational or personnel data regarding an alleged perpetrator who is a student or employee of the charter school. School officials will notify the parent(s) or guardian(s) of students who are targets or victims of hazing and the parent(s) or guardian(s) of alleged perpetrators of hazing who have been involved in a reported and confirmed hazing incident of the remedial or disciplinary action taken, to the extent permitted by law.
- F. In order to prevent or to respond to hazing committed by or directed against a child with a disability, the charter school shall, where determined appropriate by the child's individualized education program (IEP) team or Section 504 team, allow the child's IEP or Section 504 plan to be drafted to address the skills and proficiencies the child needs as a result of the child's disability to allow the child to respond to or not to engage in hazing.

VI. RETALIATION OR REPRISAL

The charter school will discipline or take appropriate action against any student, teacher, administrator, volunteer, contractor, or other employee of the charter school who commits an act of reprisal or who retaliates against any person who asserts, alleges, or makes a good faith report of alleged hazing, who provides information about hazing, who testifies, assists, or participates in an investigation of alleged hazing, or who testifies, assists, or participates in a proceeding or hearing relating to such hazing. Retaliation includes, but is not limited to, any form of intimidation, reprisal, harassment, or intentional disparate treatment. Disciplinary consequences will be sufficiently severe to deter violations and to appropriately discipline the individual(s) who engaged in the prohibited conduct. Remedial responses to the prohibited conduct shall be tailored to the particular incident and nature of the conduct.

VII. DISSEMINATION OF POLICY

- A. This policy shall appear in full on the SRMCS web site and a summary will be provided in both employee, and parent and student handbooks.

- B. The charter school will develop a method of discussing this policy with students and employees.

Legal References: Minn. Stat. § 121A.031 (School Student Bullying Policy)
Minn. Stat. § 121A.0311 (Notice of the Rights and Responsibilities of Students and Parents Under the Safe and Supportive Minnesota Schools Act)
Minn. Stat. § 121A.40-121A.56 (Pupil Fair Dismissal Act)
Minn. Stat. § 121A.69 (Hazing Policy)

Cross References: MSBA/MASA Model Policy 403 (Discipline, Suspension, and Dismissal of Charter School Employees)
MSBA/MASA Model Policy 413 (Harassment and Violence)
MSBA/MASA Model Policy 506 (Student Discipline)
MSBA/MASA Model Policy 514 (Bullying Prohibition Policy)
MSBA/MASA Model Policy 525 (Violence Prevention [Applicable to Students and Staff])

Appendix J – Tobacco Free Environment

Swan River Montessori Charter School

Adopted: 2005

MSBA/MASA Model Policy 419 Charter

Orig. 2022 (as Charter Policy)

Revised: 12.16.25

Rev. 2024

419 TOBACCO-FREE ENVIRONMENT; POSSESSION AND USE OF TOBACCO, TOBACCO-RELATED DEVICES, AND ELECTRONIC DELIVERY DEVICES; VAPING AWARENESS AND PREVENTION INSTRUCTION

I. PURPOSE

The purpose of this policy is to maintain a learning and working environment that is tobacco free.

II. GENERAL STATEMENT OF POLICY

- A. A violation of this policy occurs when any student, teacher, administrator, other school personnel of the charter school, or person smokes or uses tobacco, tobacco-related devices, or carries or uses an activated electronic delivery device in a public school. This prohibition extends to all facilities, whether owned, rented, or leased, and all vehicles that a charter school owns, leases, rents, contracts for, or controls. In addition, this prohibition includes vehicles used, in whole or in part, for work purposes, during hours of school operation, if more than one person is present. This prohibition includes all charter school property and all off-campus events sponsored by the charter school.
- B. A violation of this policy occurs when any student possesses any type of tobacco, tobacco-related devices, or electronic delivery devices in a public school. This prohibition extends to all facilities, whether owned, rented, or leased, and all vehicles that a charter school owns, leases, rents, contracts for, or controls and includes vehicles used, in whole or in part, for school purposes, during hours of school operation, if more than one person is present. This prohibition includes all charter school property and all off-campus events sponsored by the charter school.

- C. The charter school will act to enforce this policy and to discipline or take appropriate action against any student, teacher, administrator, school personnel, or person who is found to have violated this policy.
- D. The charter school will not solicit or accept any contributions or gifts of money, curricula, materials, or equipment from companies that directly manufacture and are identified with tobacco products, tobacco-related devices, or electronic delivery devices. The charter school will not promote or allow promotion of tobacco products or electronic delivery devices on school property or at school-sponsored events.

III. DEFINITIONS

- A. “Electronic delivery device” means any product containing or delivering nicotine, lobelia, or any other substance, whether natural or synthetic, intended for human consumption that can be used by a person to simulate smoking in the delivery of nicotine or any other substance through inhalation of aerosol or vapor from the product. Electronic delivery devices includes but is not limited to devices manufactured, marketed, or sold as electronic cigarettes, electronic cigars, electronic pipe, vape pens, modes, tank systems, or under any other product name or descriptor. Electronic delivery device includes any component part of a product, whether or not marketed or sold separately. Electronic delivery device excludes drugs, devices, or combination products, as those terms are defined in the Federal Food, Drug, and Cosmetic Act, that are authorized for sale by the United States Food and Drug Administration.
- B. “Heated tobacco product” means a tobacco product that produces aerosols containing nicotine and other chemicals which are inhaled by users through the mouth.
- C. “Tobacco” means cigarettes and any product containing, made, or derived from tobacco that is intended for human consumption, whether chewed, smoked, absorbed, dissolved, inhaled, snorted, sniffed, or ingested by any other means, or any component, part, or accessory of a tobacco product, including, but not limited to, cigars; cheroots; stogies; perique; granulated, plug cut, crimp cut, ready rubbed, and other smoking tobacco; snuff; snuff flour; cavendish; plug and twist tobacco; fine cut and other chewing tobacco; shorts; refuse scraps, clippings, cuttings and sweepings of tobacco; and other

kinds and forms of tobacco. Tobacco excludes any drugs, devices, or combination products, as those terms are defined in the Federal Food, Drug, and Cosmetic Act, that are authorized for sale by the United States Food and Drug Administration.

- D. “Tobacco-related devices” means cigarette papers or pipes for smoking or other devices intentionally designed or intended to be used in a manner which enables the chewing, sniffing, smoking, or inhalation of vapors aerosol or vapor of tobacco or tobacco products. Tobacco-related devices include components of tobacco-related devices which may be marketed or sold separately.
- E. “Smoking” means inhaling, exhaling, burning, or carrying any lighted or heated cigar, cigarette, pipe, or any other lighted or heated product containing, made, or derived from nicotine, tobacco, marijuana, or other plant, whether natural or synthetic, that is intended for inhalation. Smoking includes carrying or using an activated electronic delivery device.
- F. “Vaping” means using an activated electronic delivery device or heated tobacco product.

IV. EXCEPTIONS

- A. A violation of this policy does not occur when an Indian adult lights tobacco on charter school property as a part of a traditional Indian spiritual or cultural ceremony. An American Indian student may carry a medicine pouch containing loose tobacco intended as observance of traditional spiritual or cultural practices. An Indian is a person who is a member of an Indian tribe as defined under Minnesota law.
- B. A violation of this policy does not occur when an adult non-student possesses a tobacco or nicotine product that has been approved by the United States Food and Drug Administration for sale as a tobacco-cessation product, as a tobacco-dependence product, or for other medical purposes, and is being marketed and sold solely for such an approved purpose. Nothing in this exception authorizes smoking or use of tobacco, tobacco-related devices, or electronic delivery devices on school property or at off-campus events sponsored by the charter school.

- C. An American Indian student or staff member may use tobacco, sage, sweetgrass, and cedar to conduct individual or group smudging in a public school. The process for conducting smudging is determined by the building or site administrator. Smudging must be conducted under the direct supervision of an appropriate staff member, as determined by the building or site administrator.

V. VAPING PREVENTION INSTRUCTION

- A. The charter school must provide vaping prevention instruction at least once to students in grades 6.
- B. The charter school may use instructional materials based upon the Minnesota Department of Health's school e-cigarette toolkit or may use other smoking prevention instructional materials with a focus on vaping and the use of electronic delivery devices and heated tobacco products. The instruction may be provided as part of the charter school's locally developed health standards.

[NOTE: In addition, charter schools may choose to require (a) evidence-based vaping prevention instruction to students in grades 9 through 12; and/or (b) a peer-to-peer education program to provide vaping prevention instruction.]

VI. ENFORCEMENT

- A. All individuals on school premises shall adhere to this policy.
- B. Students who violate this tobacco-free policy shall be subject to charter school discipline procedures.
- C. Charter school administrators and other school personnel who violate this tobacco-free policy shall be subject to charter school discipline procedures.

- D. Charter school action taken for violation of this policy will be consistent with requirements of applicable collective bargaining agreements, Minnesota or federal law, and charter school policies.
- E. Persons who violate this tobacco-free policy may be referred to the building administration or other charter school supervisory personnel responsible for the area or program at which the violation occurred.
- F. School administrators may call the local law enforcement agency to assist with enforcement of this policy. Smoking or use of any tobacco product in a public school is a violation of the Minnesota Clean Indoor Air Act and/or the Freedom to Breathe Act of 2007 and is a petty misdemeanor. A court injunction may be instituted against a repeated violator.
- G. No persons shall be discharged, refused to be hired, penalized, discriminated against, or in any manner retaliated against for exercising any right to a smoke-free environment provided by the Freedom to Breathe Act of 2007 or other law.

VII. DISSEMINATION OF POLICY

- A. This policy shall be referenced and explained in the Swan River Montessori Charter School Parent Handbook and Employee Handbook.
- B. The charter school will develop a method of discussing this policy with students and employees.

Legal References: Minn. Stat. § 120B.238 (Vaping Awareness and Prevention)
Minn. Stat. § 121A.08 (Smudging Permitted)
Minn. Stat. §§ 144.411-144.417 (Minnesota Clean Indoor Air Act)
Minn. Stat. § 609.685 (Sale of Tobacco to Persons Under Age 21)
2007 Minn. Laws Ch. 82 (Freedom to Breathe Act of 2007)

Cross References: MSBA/MASA Model Policy 403 (Discipline, Suspension, and Dismissal of Charter School Employees)
SRMCS Student Discipline Policy