



Parent/Student Handbook

Grades 7-12

2026-2027 School Year

207 N Mesa Dr, AZ 85201 (480) 599-0137

Dear Heartwood Families,

It is with warmth and gratitude that we welcome you to Heartwood Montessori! The following parent/student handbook is intended to provide you with some basic information about the school.

The staff of Heartwood is committed to serving students and providing the highest quality educational environment for each student. In return we ask each family to commit to partnering with Heartwood to best support students. To support this process, it is necessary for all families to become familiar with Heartwood programs and policies, as outlined in the handbook, and commit to following them.

Please do not hesitate to call if you have any questions about the content of this book or any aspect of your child's experience at Heartwood.

On Behalf of the Student,

Sherri Sampson
Executive Director

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GENERAL INFORMATION

Heartwood Montessori reserves the right to amend this handbook as needed and will provide notice of such to parents. By acknowledging your receipt and review of the handbook, you are also agreeing to abide by any terms and conditions stated in these amendments.

Hours of Operation are: 7:30am to 5:30pm Monday through Friday.

Telephone: (480) 599-0137

Website: www.heartwoodaz.org

Federal Tax ID #: 82-2411118

Heartwood Montessori does not transport students to and from school. Heartwood Montessori is a drug free, smoke free, and weapon free facility. No person shall possess or engage in the use of marijuana at Heartwood Montessori's facilities, vehicles, or events.

Resume information for instructional personnel is available in the Front Office.

MISSION STATEMENT

Heartwood Montessori Charter School is dedicated to the development of well-rounded individuals who are proficient, self-confident and have ascertained the potential and desire for lifelong learning and improved academic performance through the implementation of the Montessori Method of Education.

ADMINISTRATION

Executive Director Sherri Sampson

Asst. Head of School Nikki Jackson

Administrative Asst. Charissa Burns

MONTESSORI PHILOSOPHY

Dr. Montessori wrote, "A child's work is to create the man he will become. An adult works to perfect his environment, but a child works to perfect himself."

Dr. Montessori, a physician, educator and engineer developed an approach to education that would aid the child in his work. The Montessori approach is based on careful observation of and respect for the natural development of the child and has been used in schools around the world for over 100 years.

The theory behind Montessori education is simple: Children want to learn. From birth to maturity, the child lives in what appears to be a chaotic world. He or she gradually establishes order by learning to distinguish the senses and develop their inner resources. The child who accomplishes this becomes a confident, self-assured learner. The main purpose of an authentic Montessori school community is to provide a carefully planned, stimulating environment which will help the child develop an excellent foundation for creative learning. Montessori classrooms provide a prepared environment where children are free to respond to their natural drive to work and learn.

One basic idea of the Montessori philosophy is that carried unseen within each child is the person that the child can become. To develop his/her physical, intellectual, and spiritual powers to the fullest, the child must have freedom - a freedom achieved through order and self-discipline. The child's world is full of sights and sounds that at first appear chaotic. From this chaos the child gradually creates order and learns to distinguish among the impressions that assail his/her senses, slowly gaining mastery of self and environment. Dr. Montessori developed what she called "the prepared environment." Among its features is an ordered arrangement of learning materials in a non-competitive atmosphere that helps each child develop at his/her own rate. "Never let the child risk failure until he has a reasonable chance of success," said Dr. Montessori, understanding the need to acquire basic skills before participating in a competitive learning situation. The years between two and six are those when a child learns the ground rules of human behavior most easily. These years can be devoted constructively to preparing the child to take his/her place in society through the acquisition of good manners, organizational skills, and work habits. Between the ages of six and twelve, the child is able to think abstractly, and is engaged and motivated by the imagination. Learning must challenge his imagination in order to be meaningful. Dr. Montessori recognized that self-motivation is the only valid impulse to learning. Children move themselves toward learning. The teacher prepares the environment, creates stimulating activities, and functions as the reference person and role model for the class. But it is the child who learns, motivated through the work itself, to persist in his chosen task. The Montessori child is free to learn because she has acquired an "inner discipline" from exposure to both physical and mental order. This is the core of Montessori's educational philosophy. Habits of concentration, perseverance, and thoroughness established in early childhood produce a confident and competent learner in later years. Historically, Montessori schools have taught children to observe, to think, and to make judgments. Montessori introduces children to the joy of learning at an early age and provides a framework in which intellectual and social discipline goes hand in hand. Through the elementary and middle school years, children in a Montessori environment acquire a strong academic and emotional base, allowing them to grow into capable young adults with integrity, intellectual honesty, and social grace.

COMMUNITY POLICY

The underlying foundation of Heartwood Montessori is to respect each individual and the environment. Our goal is to create a safe space for our students, staff and families,

psychologically, emotionally and physically. To that end, our guiding light when dealing with sensitive/difficult topics is to make sure the individual feels seen and heard. As transgender and LGBTQ+ individuals consider joining the Heartwood Montessori community and parents/families have questions about these issues, we need to have answers. It is our policy that we treat all individuals with respect and dignity, regardless of our personal opinions/beliefs. Should a student ask to be referred to with a pronoun that is different from their biology, the adults in the environment will respect that request. It is important to let the student know that habits are hard to break so the adult will do their best and be open to reminders. We will not require the other students in the room to use the different pronouns; it will be their choice. Should this become an issue between students, the adult(s) will mediate the conflict as they would any other, focusing on listening to peers and respecting their opinions/choices even when we disagree. Treating students (our students) with respect and dignity and providing a safe space, in all ways, to meet their needs is the foundation of Montessori philosophy and, thus, will be the foundation of all policies affecting our community.

SCHOOL PARTNERSHIP AGREEMENT

Introduction

At Heartwood Montessori, we are committed to nurturing a culturally diverse community of students by providing access to an authentic AMI Montessori program. Our mission is to cultivate each child's natural capacities and talents, guiding them to become lifelong learners, thinkers, creators, and civic leaders. This agreement outlines the mutual expectations between the school and families to ensure a respectful, safe and enriching educational environment.

Parent/Guardian Expectations

Parents and guardians are expected to:

- Support and reinforce the school's policies and procedures.
- Communicate respectfully and constructively with school staff.
- Address concerns through appropriate channels, allowing staff adequate time to respond.

Unacceptable behaviors include:

- Disruptive actions that interfere with school operations.
- Use of offensive language or aggressive behavior.
- Threats or acts of physical harm toward any member of the school community.
- Damage to or destruction of school property.
- Abusive or threatening communication in any form directed at school personnel.

Such behaviors may lead to appropriate actions by the school, including legal measures.

CUSTODY ISSUES AND PARENTAL DISPUTES

Heartwood Montessori will not involve itself in custody issues or negotiations. The school will not act as the referee for parental disputes. It is the parents' responsibility to provide the school with a current copy of any custody orders and/or parenting plans. The school will follow the most current valid documents in its possession.

Under Arizona law (A.R.S. 25-403.06(A)), both parents are entitled to equal access to information concerning their child's education, upon reasonable request. The only exceptions are if a court order or relevant law states otherwise.

If a person other than the parent has been granted guardianship, the legal guardian is responsible for providing the school with relevant documentation, including the conditions of the guardianship.

ENROLLMENT

Charter School (7-12)

Families that attend Heartwood Montessori charter school are required to complete an application and provide proof of AZ residency as the first step to enrollment. We also ask that each family attend an Informational Session. All students that submit an application to the Heartwood Montessori charter school will be accepted, unless the number of applications exceeds the capacity of a program, class, grade level or building a lottery will be conducted. Heartwood Montessori may refuse to enroll any student that has been expelled or is awaiting expulsion from their previous school.

Families will have one week to confirm acceptance of enrollment and 30 days to submit all required documents. Students must have a complete immunization record per A.R.S. 15-872 on file prior to their first day of attendance.

Statement of Nondiscrimination

Heartwood Montessori admits students of any sex, gender identity, sexual orientation, religion, creed, actual or perceived race, color, national and ethnic origin, income level, athletic ability, proficiency in the English language, physical handicap or disability to all the rights, privileges, programs and activities generally accorded or made available to students at our school. In accordance with the Age Discrimination Act, Boy Scouts of America Equal Access Act, Section 504 of the Rehabilitation Act of 1973, Title IX of the Education

Amendments of 1972, Title II of the Americans with Disabilities Act of 1990, Title VI of the Civil Rights Act of 1964, and applicable state law, Heartwood Montessori does not discriminate on the basis of age, religion, creed, income level, athletic ability, proficiency in the English language, physical handicap or disability, actual or perceived race, color, national and ethnic origin, sex, gender identity or sexual orientation, in administration of its educational policies, admissions policies, scholarship, and athletic and other school-administered programs and operations, and provides equal access to the Boy Scouts and other designated youth groups. Inquiries regarding Heartwood Montessori's non-discrimination policies may be sent to Sherri Sampson, Executive Director, 207 N. Mesa Drive, Mesa, Arizona, 85201, (480) 599-0137, Info@heartwoodaz.org. For further information on non-discrimination in schools, visit <https://ocrcas.ed.gov/contact-ocr>.

ATTENDANCE

It is important that students are in class every day. Each student is an essential part of the classroom dynamics. Lessons are planned for students each day; thus, a student's absence impacts the schedule. If a student arrives late, they are missing out on valuable class time. If the student arrives after class time has begun, he/she must be checked in at the front desk by his/her parent, guardian, or authorized contact.

Regular attendance and punctual arrival at school are two habits that dramatically impact student achievement. Absences and tardiness are disturbing to students, disrupt their schedules, require readjustment to the class routine, and diminish learning. Parents are urged to make every effort to schedule doctor, dentist, and other appointments for students at times outside of the school day.

Absences or tardiness resulting from a chronic illness documented by a physician will be marked as excused. Please contact the front office for more information if your child has a documented chronic health problem.

Absences

In case of an absence, early pick up or special arrangement, please complete an Absence Form via SchoolCues. This will deliver the message the fastest to administration, front office staff and your classroom Lead and Assistant.

1. If you are unable to report the absence via SchoolCues, you may call the school office to report the absence at (480) 599-0137. Leave a message if necessary. For absences to be excused, the school must be notified in advance or at the time of any absence by the parent or guardian.
2. Vacation should be planned during regularly scheduled breaks. The school does not condone taking students out of school during the regular school schedule. Family

vacations and extended holidays outside of scheduled school breaks are unexcused, unless the parent or guardian has provided written notification for such absence.

3. An **excused absence** is defined as an absence due to illness, doctor appointment, mental or behavioral health, religious observances, homelessness, bereavement, family emergencies, time necessary to process for the armed forces, and out-of-school suspensions. Excused absences due to out-of-school suspensions may not exceed 10% of the instructional days scheduled for the school year.
4. Pursuant to A.R.S. 15-803(A)(2), in order for any of the above absences to be excused, a student who is under 16 years of age must be accompanied by a parent, guardian, or a person authorized by a parent. Students over 16 years of age must be excused in writing by their parents or guardian.
5. Ten consecutive days of unexcused absences will be cause for automatic withdrawal.
6. Students are accountable for missed work.
7. Frequent patterns of absences may result in a meeting with the teacher and/or Head of School. Penalties for excessive absenteeism (more than 18 days per school year) may include non-promotion to the next grade for students in K - 8th. For students in high school, excessive absenteeism (more than 18 days per school year) may result in loss of course credits.

Tardiness

1. The school day starts at 8:30 AM for students. A student is considered late if he or she is not in class at the start of the school day.
2. Frequent tardiness may result in a meeting with the teacher and/or Head of School. Due to the nature of the Montessori Method, tardiness is very disruptive to a student's school performance and is handled very seriously by administration.
3. Students that are habitually truant (unexcused from at least one class period during the day for 5 or more days per school year) may be subject to further administrative action.
4. A tardy may be considered excused when due to illness, doctor appointment, mental or behavioral health, religious observance, homelessness, bereavement, family emergencies, or circumstances beyond a parent's control. A note from the parent or guardian is required. Parents or guardians may be notified via email of each unexcused tardy, and, if necessary, by telephone as required by law.

CAR LINE PROCEDURE

For the safety of the students please finish all phone conversations prior to entering the car line and refrain from texting while in the carline. Should you need to continue a phone conversation, please exit the carline and park. Once you have finished your conversation, you may pick up your child in the lobby.

Drop-Off Procedures

- Drop off starts at 8:15 AM and ends at 8:30 AM.
- Make your way through the sectioned off areas in the parking lot.
- Pull up to where the teacher is stationed.
- Teachers will open the correct door and assist students out of the vehicle.
- Students will always exit the vehicle on the same side as the school entrance.
- ***Please stay in your vehicle during the carline process.*** We ask all parents to follow these guidelines to assist with the efficiency of the car line and with the safety and independence of the student.

Pick-up Procedures

- Pick-up starts at 3:00 PM and ends at 3:15 PM.
- Make your way through the sectioned off areas in the parking lots.
- Pull up to where the teacher is stationed.
- Teachers will open the car door, allowing students to enter on the correct side. If needed, the teacher will assist the student into their booster/car seat.
- Once students are safely inside the vehicle, the teacher will close the door.

Half-Day Procedures

- Pick-up starts at 11:45 AM and ends at 12:00 Noon.
- Pick-up is in the same carline as normal pick-up.
- Pull up to where the students are stationed.
- Staff will open the correct door and assist your child into the vehicle.
- Please stay in your vehicle during the carline procedure.

Late Drop-Off/Pick-Up Procedures

- If you arrive after the morning car line ends, you must park your car, walk your

student to the office door and wait for a staff member to direct your student to class.

- If you arrive after the pickup car line ends, you must park your car, walk to the office door and wait there for your student.

Before Care Procedures

- Park in the north parking lot and walk your student to the north side office door.
- A staff member will greet your student and direct them to before care.

After Care Procedures

- Park in the north parking lot and enter the lobby on the north side.
- Please wait outside the gymnasium until a staff member releases your student.

SIGN IN/OUT

Any student arriving late or leaving early must be checked in/out by a parent/guardian or designated individual (18 years and older). If the student is of driving age, a written permission form must be on file signed by the parent/guardian to allow the student to arrive and/or sign themselves into/out of the school. If someone other than the parent is signing a student out, the school must have written permission on file. Photo identification is required from any adult who is an authorized individual but not known to school personnel and who is signing a student out.

DISMISSAL

Heartwood Montessori will only release a student to the parent, guardian or an authorized person **as stated on the student dismissal authorization form**. If someone else is going to pick up a student, the parent must call or email the office. In cases of doubt, we will phone the custodial parent to confirm that someone else has been authorized to pick up the student. Photo identification is required from any adult who is not known to school personnel and who comes to pick up a student.

CURRICULUM

Heartwood Montessori's curriculum is aligned to the Arizona Department of Education's K-12 Academic Standards. The Arizona Department of Education's K-12 Academic

Standards can be viewed online at the following link
<https://www.azed.gov/standards-practices/>

OBSERVANCE DAYS AND MOMENT OF SILENCE

Observance Days

September 11 each year shall be observed as 9/11 Education Day at Heartwood Montessori. On 9/11 Education Day, Heartwood Montessori shall dedicate a portion of the school day to age-appropriate education on the terrorist attacks of September 11, 2001.

September 25 each year shall be observed as Sandra Day O'Connor Civics Celebration Day at Heartwood Montessori. On Sandra Day O'Connor Civics Celebration Day, Heartwood Montessori shall dedicate the majority of the school day to civics education.

If either of these days falls on a Saturday, Sunday or other day when school is not in session, the preceding or following school day shall be observed.

Heartwood Montessori will emphasize the use of the resources developed by the State Board of Education relating to civics education which align with the academic standards in social studies pursuant to A.R.S. 15-701 and 15-701.01.

Moment of Silence

Heartwood Montessori will set aside at least one minute but not more than two minutes at the beginning of each school day for students to engage in a moment of silence during which students may not interfere with other students' participation. A teacher or other school employee may not suggest the nature of any reflection in which a student may engage during the moment of silence. Each teacher of a class in which a moment of silence occurs shall encourage parents of students in the class to discuss with their children how to best use the moment of silence.

Additionally, Heartwood Montessori will comply with the requirements of A.R.S. 15-506.

PROMOTION/RETENTION

Promotion

Consistent with A.R.S. 15-701, Heartwood Montessori students will be promoted to the next program level based on demonstration of mastery, academic growth, and social-emotional readiness. Montessori authentic assessments and other state required tests will be used to determine if a student is likely to be successful in the next program level. A student spends three years of study in a mixed-aged program level. They have three years to demonstrate readiness for promotion to the next developmentally appropriate program.

Guides assess student mastery of academic content through observation and record keeping, standardized assessments, and other criteria. Guides assess student scores on state assessments, particularly in the area of reading. Guides assess student social-emotional readiness through observation and student/family conferences.

Promotion for 7th and 8th grade students is assumed if the student meets 70% mastery and the guide is in agreement with the family that the student is ready to be promoted to the next grade level or, more importantly, the next program if during a transition year.

Retention

Retention (remaining at the same level for an additional year) is an action that may be taken to assist students in 7th and 8th grade to be more successful in their learning. Early intervention is critical for maximizing the positive outcomes needed for each student's success. Risk for retention will be identified as early in the student's school career as possible. As soon as a student is identified as "at risk" of retention, the guide and Head of School will begin interventions to assist the student in the areas of concern. Parents will be included in this discussion and process as early as possible, and as early in the school year as possible. If the student does not make progress, the Student Study Team will make a determination that will activate the Head of School's involvement right away. In collaboration, the guide, the Student Study Team, and the Head of School will provide a recommendation about the student's lack of readiness, at which point the Head of School will involve the family in the decision. Decisions to retain a student will be made only after a study of data collected over a period of time relating to the student's growth and development. Ultimately, the decision lies with the Head of School. Decisions about retention for students grades 7 and 8 will be based on this standard as well as the following:

- Arizona State Board for Charter Schools (ASBCS) Level of Academic Performance set for State math and reading assessments
- Physical, social, psychological, and emotional considerations
- Special needs
- Information provided by parents, guardians, teachers, and other outside resources, when applicable
- Demonstration of individual student learning as measured by, but not limited to:
 - Montessori-based assessments in core curricular areas
 - MAPS data in math, reading, English language arts, and science
 - Teacher/Classroom-based student assessments and observations in reading, language arts, and math—grade level placement scores at least a year above/below expectations
 - Scientifically based diagnostic screening and assessments in math and reading
 - State-mandated assessments (AIMS & Stanford10)—exceeding/falling below grade level expectations, as defined by the Arizona State Board of Charter Schools and the Arizona Department of Education (ADE)
 - Meeting intervention goals/objectives, as determined by the Student Support Team (SST) and/or the student's IEP

Earning Credit and Credit Recovery

Students in the lower and upper secondary programs are expected to earn a grade of 70% or better for all of the classes they are enrolled in. Students in grades 9 through 12 will not receive credit for classes in which they earned a grade lower than 70%. Those students will need to participate in a credit recovery method approved by Heartwood Montessori administration in order to remain on track for graduating from Heartwood Montessori.

English Language Learners (ELL)

Heartwood Montessori recognizes that English Learners may be “at risk” based on the challenges they face in acquiring mastery of curricular areas in English. Students learning English will be provided with supplemental instruction as a key intervention to ensure that they will eventually gain expected proficiency for their level.

Decisions regarding promotion or retention of students identified as English Language Learners require special consideration. Following the supplemental instruction for the English Learner, if it is determined through the Student Study Team process that the student would benefit from retention, the above determinations and process will be followed.

Special Education (IDEA)

Students whose physical, mental, or learning disabilities are provided protection under the Individuals with Disabilities Education Act (IDEA) have their educational needs supported

through Special Education (specially designed instruction) and related services (which enable them to benefit from their Special Education program).

Modification of curriculum and student assessment will be utilized for students on an Individual Education Plan (IEP). Accommodations put in place for students who have a 504 Plan or are in Special Education are not used when considering retention of the student. Retention may be considered for students on a 504 Plan or IEP if the academic, social, and emotional needs of the student would benefit from remaining at the same level for an additional year. The Student Study Team will include a “highly qualified” educational specialist, as defined and required by Arizona Charter Law.

Appeals Process

When recommendations for promotion or retention are not agreed upon by parents and/or guardians, they will be advised of their right to appeal first to the Head of School; if not resolved in that process, they may present a final appeal to the Heartwood Montessori Governing Board. The Head of School will provide the Governing Board with pertinent documentation relating to the promotion/retention decision, including, but not limited to, assessment/testing results, student progress reports, and SST meeting notes.

GRADUATION REQUIREMENTS

Heartwood Montessori prepares students to be lifelong learners, thinkers, creators, and civic leaders. Our graduation requirements are designed to meet or exceed A.R.S. 15-701.01, and all related standards adopted by the State Board of Education as requirements for graduation. The statewide minimum course of study requires students take a minimum of 22 credits. Please contact the front office for a complete list of course offerings and graduation requirements.

SPECIAL EDUCATION

Child find is a component of the Individuals with Disabilities Education Act (IDEA '04) that requires Heartwood Montessori to locate, identify, and evaluate all children with disabilities, aged birth through 21, located within its boundaries of responsibility who are in need of early intervention or special education services. Heartwood Montessori charter school must identify, locate, and evaluate all children with disabilities within its population who are in need of special education and related services. Child Find applies to children who are: suspected of having a disability even though they are advancing from grade to grade; highly mobile, such as migrant and homeless; wards of the state; private school students; and homeschool students.

Special education services are available to students attending Heartwood Montessori Charter School who are identified with a disability as indicated under the Individuals with Disabilities Education Act and require specially designed instruction. Contact the school if

you have a student enrolled at Heartwood Montessori charter school that you suspect may have a disability.

STUDENTS WITH DISABILITIES COVERED BY SECTION 504

Section 504 of the Rehabilitation Act is a civil rights statute that prohibits discrimination against students with disabilities in any of Heartwood Montessori's programs or activities. Section 504 applies to students that currently, or in the past, have a physical or mental impairment that substantially limits a major life activity, has a record of such impairment or is regarded as disabled by others. Heartwood Montessori must identify, evaluate, and provide a free appropriate public education to all qualifying students with disabilities under Section 504. Additionally, Heartwood Montessori must ensure that no student shall, solely by reason of his or her disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination under any of Heartwood Montessori's programs or activities.

If you believe that your child has a disability that would qualify him or her for Section 504 protections, contact Heartwood Montessori's Section 504 Coordinator at:

Sherri Sampson, Executive Director
207 N Mesa Dr.
Mesa, Arizona 85201
(480) 599-0137
Info@heartwoodaz.org

STUDENT HEALTH AND WELLNESS

In case of injury or illness during school hours, the student will be brought to the school office. Parents will be notified by phone when a student is sick or injured. It is the parent's responsibility to collect the student within 45 minutes of contact from the school. If a parent cannot be reached, the office will call the alternate pick-up names on the emergency card.

Parents are responsible for keeping all emergency information current by making any changes in addresses, telephone numbers, or emergency contact information in SchoolCues and the front office.

We cannot admit your child to school if one or more of the following conditions exist:

1. The illness prevents the student from participating comfortably in normal school activities, including outdoor play.

2. The illness/injury requires more care than teachers can provide without compromising the health, safety, and supervision of the other students in the class.
3. The student has a body temperature of 100.0 degrees or greater.
4. Symptoms and signs of possible severe illness, such as lethargy, abnormal breathing, uncontrolled diarrhea, vomiting, unexplained rash, mouth sores with drooling, behavior changes, or other signs that the student may be ill.
5. A health-care professional has diagnosed the student with a communicable disease.
6. Students with pediculosis (lice infestation) shall be excluded from school until treated with a pediculicide. Students will need to be checked by Admin before re-entering the classroom.

Students should come to school healthy. Students may not return within 24 hours after displaying vomiting, diarrhea or a fever over 100.0 degrees (without fever reducing medication). If your student develops a fever, or shows other signs of illness during school hours, you will be called to arrange for him/her to be picked up. Students with communicable diseases as defined by Arizona Department of Health Services may not come to school, nor be readmitted until the recommendations by the Arizona Department of Health Services have been met.

Medical Emergencies

In the event that a student needs emergency medical attention, 911 will be called. The parent or person responsible will be notified. If it is necessary to transport a student to the hospital, a staff member will accompany the student and remain with that student until one of the parents (or someone designated by the parent) arrives at the hospital. Staff members with current CPR/First Aid training are always present on campus and will administer aid whenever necessary.

Medication

1. A designated staff member is responsible for the administration of all medications including storing, supervising ingestion, and recording the dosage.
2. The administration of medication is not permitted unless the student's parent completes a medical consent form, except for an emergency administration pursuant to ARS 15-157 (epinephrine), ARS 15-158 (inhalers), or ARS 15-341(A)(43) (naloxone hydrochloride/any other opioid antagonist). This form can be obtained in the front office and on SchoolCues.

3. Prescription medication will only be administered from a container dispensed by a pharmacy and non-prescription medication will only be administered from a prepackaged container labeled for use by the manufacturer and labeled with the enrolled student's name. No medication will be administered that has been transferred from one container to another.
4. Medication is to be brought directly to the office by an adult. **It is NOT acceptable to send medication or vitamins in a student's backpack, lunchbox, or pants pocket. This is a serious health hazard to the other students on campus.** Medication is to be brought directly to the office by a parent or guardian.
5. Students who have been diagnosed with anaphylaxis may carry and self-administer emergency medications including epinephrine auto-injectors, provided the student's name is on the prescription label, on the medication container or device and the student's parent provides Heartwood Montessori annual written documentation authorizing possession and self-administration. The student shall notify school staff of the use of the medication as soon as possible.
6. Students with diabetes may carry appropriate medications and monitoring equipment and self-administer their medication, provided their parent has submitted a diabetes medical management plan to Heartwood Montessori that is signed by a licensed health professional or nurse practitioner.

Asthma Policy

Students who suffer from severe asthma have the right to keep a handheld inhaler device with them before and after school and during the school day, provided the student's name is on the prescription label, on the medication container, or on the handheld inhaler device. There is a specific protocol in place to make the determination as to whether a particular student demonstrates the skill and level of responsibility to be able to carry medication and to self-administer medication for symptom self-management. An Individual Asthma Action Plan is developed for each asthma student with input from the health care provider, parent, teacher and student. Related forms can be obtained in the school office. It is the parent's responsibility to initiate this process. Students are not allowed to carry medication until the forms have been completed and approval given. The new law regarding students carrying asthma medication requires parents to provide annual written documentation authorizing the student to possess and self-administer a handheld inhaler.

Hearing and Vision Screenings

A.R.S. 36-899.01 and 899.10 require Heartwood Montessori to provide hearing evaluation and vision screening programs to all students. If you do not want your child to participate in

either of these programs, please contact the front office for a Hearing & Vision Opt-Out Form.

PERSONAL BELONGINGS

Secondary students are expected to bring a backpack to hold their school items. They will bring this backpack with them to each learning space that they use throughout a given day. Students are in charge of their personal belongings, and they are expected to keep track of them and make sure they are organized. See the technology and internet section below concerning personal devices including phones, watches, or any other device that connects to the internet.

Personal belongings must be age appropriate. Books or other materials that are not age appropriate will be confiscated and sent home with parents at the end of the day.

SCHOOL CAMPUS VISITS AND OBSERVATIONS

All visitors and parents must check in at the office, present photo identification, and obtain a visitor's badge. Visitors and parents will be accompanied by an employee throughout the entire duration of their stay. All visitors and parents must check out and exit the school through the front office.

Classroom observations should be scheduled ahead of time by contacting the front office. Audio or video recording is not permitted without the written authorization of the Head of School. Cell phones must be turned off while in the classroom.

HOME PREPARATION OF LUNCH

At Heartwood Montessori we place an emphasis on good nutritional health and including students in the process of participating in making their daily lunch. Students learn about foods and their importance in building healthy bodies and minds. Please provide choice of foods that are as close to their natural form as possible. Fresh fruits and vegetables, dairy products and whole grains are all good examples. Heartwood Montessori supports a "no barcode" lunch policy. Please do not send "squeezable pouches" for students to suck food out of as we promote the use of utensils and dishware at lunch.

It is of preference, that all lunches and foods brought to school should be in reusable glass containers that the student can manage to open. This promotes healthy eating as well as less product waste to the environment. The lunch container must include a "cool pack", as the lunches will not be stored in the classroom refrigerator. It is recommended that hot foods be sent in a thermos. Lunch boxes should be in solid color or a design/print. Please

refrain from bringing lunch boxes portraying characters or logos.

Granola bars, chips, pretzels, goldfish, soups, peanut butter, applesauce, yogurts and cereals should be all natural with no/low sugars. Students should have a balanced lunch that includes a protein, fruit/vegetable and grain.

Lunch is an important community time for students. We emphasize Grace and Courtesy and Practical Life activities during this time. Students set the tables with placemats or tablecloths, silverware, napkins, plates and/or bowls, glasses and flowers. A separate table will be available, if requested, for students with food restrictions due to allergies.

Students bring their lunches and are to follow school policy by bringing nutritious food. Students are expected to eat from their plates and return containers and plastic bags to their lunchboxes. Each table waits until everyone at the table is prepared to eat. We work hard to make this the most pleasant and relaxing social time possible. All students are not to bring beverages; we will provide whole milk and water.

Due to severe and potentially unknown allergies, students do not share food at school. Furthermore, due to the coordination and being conscientious of staying in ratio, no sharing of food also extends to siblings. If a student does not come to school with a lunch, the student will prepare him/herself lunch from the school kitchen. Please do not bring your student's lunch if they forget it; it is their responsibility to remember to bring it.

In an effort to cut down on waste and as a way of enhancing the student's interest in being environmentally friendly, the students will return uneaten food, containers and plastic bags to their lunchboxes. By returning all of these items the students can see whether they are packing too much food, as well as how much waste they may have generated.

PARENT VOLUNTEERS

All parent volunteers are required to retain a valid Arizona Fingerprint Clearance Card at all times. Parent volunteers are not allowed to be alone with any student other than their own child. If it is anticipated that a parent volunteer will be alone with students at any point, they must obtain an Identity Verified Fingerprint Clearance Card through the Arizona Department of Public Safety. Parents are responsible for paying the applicable fee to the Department of Public Safety.

Prior to contributing time and talent to the school, volunteers must attend the Heartwood Montessori Volunteer Training session and submit the Volunteer Guidelines acknowledgement form. All parents offering driving services for Field Trips or Going Outs must provide proof of insurance prior to any given trip.

COMMUNICATIONS

Please inform the student's teacher of any changes at home or in the student's life that may have an effect at school so that we can better provide for the needs of the student.

It is VERY important that both parents read all communications from the student's teacher and Heartwood Montessori.

In order to facilitate positive communications, the parent should discuss any concerns directly with the classroom teacher. If this first step does not resolve the problem, the parent should contact the Head of School.

FREEDOM WITH RESPONSIBILITY

The balance of freedom and responsibility is essential to form a harmonious community. It is freedom with responsibility that leads the individual to self-discipline. In the classroom the student is allowed to make those choices, which are dictated by his sensitive periods and inherent developmental needs. We must not restrict the student too much or direct him too little otherwise his intellect and personality will not become integrated.

The freedoms of the individual must not infringe on the rights of the others in the group; therefore, the teacher is to make sure the freedoms of the student are balanced with rules for courteous and considerate behavior.

Montessori is very clear that behavior, which is unbecoming or harmful to others or to the student himself, is unacceptable. The freedoms in the classroom must have logical limitations, to which the student should feel inclined to conform. The rules that we set must serve the student for life.

We have specific rules in the class with certain limitations:

1. The student is often free to choose work based on the lessons presented or the projects assigned as long as the student is using time productively.
2. The student is free to work as long as s/he wishes according to her/his own timing and rhythm within the time constraints of a work cycle. There are few limitations to this freedom, except the essential events of the day, in which the student is required to participate.
3. The student is free to move about. S/he may engage in independent work where s/he wishes, in any part of the room. S/he may work at a table or on a mat on the floor.

S/he may approach other students, and if appropriate may even work outside. This freedom must never be a license for producing noise or disorder. The student is not allowed to move in a way that disrupts other students. If the student needs to leave a learning environment, they must follow a protocol for signing out by including their name, the time they are leaving, and the place on campus that they are going to.

4. The student is free to interact and communicate, which brings about a natural socialization process. The student's voice must not be so loud that it produces a noise level that disturbs other students in their work. The student must also learn not to interrupt another student who is working.
5. The student is free to repeat. We introduce the idea of repetition and keep encouraging it. The reason for this is because people move quickly from one thing to another in our fast-paced society.
6. The student is free to utilize school-provided technology. The technology must be used within sight of a guide, and must be used for meaningful learning and/or work. The student must learn to use tools for an intended purpose and not for entertainment.

We can see clearly that freedom in the classroom is not the freedom to be disorderly or undisciplined. The rules are made clear mostly through lessons of grace and courtesy.

DISCIPLINE AND CORRECTIVE BEHAVIOR

When we find it necessary to correct a student's behavior, we must follow a logical plan. Correction must not be chastisement. Students learn self-discipline if they live under a positive plan of discipline.

For a plan of discipline to be successful the student must not only understand the rules but must also wish to conform to them. Unacceptable behavior can have two types of consequences.

1. **Natural Consequences** are natural results of inappropriate action. The student learns from natural consequences without the humiliation of being scolded or corrected by the adult.
2. **Logical Consequences** are decided by the adult and are not to be administered as punishment. They must have a logical relation to the misdeed and usually restrict the freedom that has been abused. The teacher will offer a positive learning experience. The student, when asked to correct their actions, needs encouragement and when a logical consequence fails, it may be that the student perceives the situation incorrectly.

Violations of the Code of Conduct

Parents and students will be provided with a code of conduct at the beginning of each year. The code of conduct will be on display in learning spaces in order for students to best understand what is expected of them behaviorally. Students are expected to follow the code of conduct. If the code of conduct is not followed, the following protocol will be implemented by the guides:

- First failure to follow the code of conduct: the guide will politely remind the student or students that the program uses a code of conduct, and the guide will explain the expectation from the code of conduct that is not being met. The guide will also explain the natural consequences of not meeting that expectation should the student or students fail to meet it again in the near future.
- Second failure to follow the code of conduct: the guide will implement the natural consequence or allow it to occur. At this point, a brief email explaining the situation should be sent to parents for the student, the lead for the secondary program, and the Head of School.
- Third failure to follow the code of conduct: a meeting will need to take place with the student, parents for the student, the lead for the secondary program, the Head of School, and the Executive Director in order to resolve the issue constructively, which may include suspension and/or expulsion.

POLICY PROHIBITING STUDENT HARASSMENT, INTIMIDATION, BULLYING, AND HAZING

Students are prohibited from harassing, intimidating, or bullying other students on school grounds, school property, at school sponsored events and activities, and through the use of electronic technology or electronic communication equipment on school computers, networks, forums or mailing lists. Hazing is prohibited. Any solicitation to engage in hazing is prohibited. Aiding and abetting another person who is engaged in hazing is prohibited. It is not a defense to a violation of this hazing prevention policy if the victim consented to or acquiesced in the hazing activity.

All students and employees shall take reasonable measures within the scope of their individual authority to prevent violations of this policy. Heartwood Montessori will comply with the requirements of ARS 15-2301 and 15-341 (36,44)

Reporting/Complaint Procedures

Heartwood Montessori's Incident Form is designed to provide a full and detailed description of incidents of harassment, intimidation, bullying, or hazing, and any other relevant information about the incident, and is available at the front office. Students and parents may confidentially report incidents of harassment, intimidation, bullying, or hazing to any employee, including the Administrator or Head of School. Employees must report in writing suspected incidents of harassment, intimidation, bullying, or hazing to the Administrator or Head of School.

The employee receiving the report/complaint shall retrieve sufficient detail from the person to complete Heartwood Montessori's Complaint Form. Employees must report the incident to the Executive Director or Head of School, in writing, with as many details as may have been provided not later than the next school day following the day the employee receives the report/complaint. Failure of an employee to timely inform the Executive Director or Head of School of a harassment, intimidation, bullying, or hazing allegation or his/her observation of such incident may subject the employee to disciplinary action. The employee shall preserve the confidentiality of those involved and only report the incident to the Administrator, Head of School, or others if required by law. Any instance of reported or observed harassment, intimidation, bullying, or hazing which includes possible child abuse shall be reported to law enforcement.

The Executive Director or Head of School will notify the alleged victim and the alleged victim's parent or guardian when an employee becomes aware of the suspected incident of harassment, threatening, intimidation, bullying, or hazing. Administration and the Head of School will follow internal policies in compliance with Arizona state law.

Record Retention

Documentation related to reported bullying, harassment, intimidation, or hazing and subsequent investigation will be maintained by Heartwood Montessori for not less than six (6) years. In the event Heartwood Montessori reports incidents to persons other than school officials or law enforcement, all individually identifiable information will be redacted. FERPA restrictions on disclosure of personally identifiable student information will be observed at all times.

Investigation

The report/complaint will be investigated by the Administrator or Head of School within ten (10) school days when school is in session or within fifteen (15) days during which the school offices are open for business when school is not in session. The Head of School may extend the timeline if she determines doing so is necessary to complete a fair investigation, in her sole discretion.

The Administrator or Head of School shall prepare a written report of the findings and a copy of the report shall be provided to the Head of School. The Administrator or Head of School will meet with the person who reported the incident and discuss the conclusions and actions to be taken as a result of the investigation. Confidentiality of records and student information will be observed in the process of making such a report. The school will not use that documentation to impose disciplinary action unless the Administrator or Head of School has investigated and determined that the reported incidents of harassment, intimidation, bullying, or hazing occurred.

The Head of School will determine if Heartwood Montessori's policies have been appropriately implemented and will make such reports and/or referrals to the Board of Directors ("Board") as may be necessary.

Consequences

Harassment, intimidation, bullying, or hazing is a serious violation of school policy and the law and will be handled very seriously by administration. Consequences will vary depending on the nature and severity of the actions, and potential implications for future harm. Consequences are meant to promote the safety of the school community by addressing dangerous student behavior. Potential consequences include:

- Student sent to office
- Detention
- Parent notified to pick up student immediately
- Teacher conference
- Administrator and parent conference
- In-school or out-of-school suspension*
- Expulsion*

Any student that knowingly submits a false report of harassment, intimidation or bullying may be subject to the following consequences:

- Student sent to office
- Detention
- Teacher conference
- Administrator and parent conference
- In-school or out-of-school suspension*

Notwithstanding the paragraph above, Heartwood Montessori prohibits retaliation against any person who reports an act of harassment, intimidation, bullying, or hazing. Students that engage in retaliation for reported violations of this policy will be subject to appropriate consequences.

Consequences may result for acts of intimidation, harassment, bullying, or hazing which occur outside of the school and the school day when such acts substantially interfere with a student's education or substantially disrupt or threaten the operation of Heartwood Montessori or its

programs.

**Suspension or expulsion of students in kindergarten through fourth grade will only be issued for violations outlined in ARS 15-843 (k).*

An organization that knowingly permitted, authorized or condoned harassment, intimidation, bullying, or hazing activities will be prohibited from conducting activities at or with Heartwood Montessori in the future.

Any employee who knowingly allowed, authorized or condoned the harassment, intimidation, bullying, or hazing activity is subject to disciplinary action up to and including termination from employment.

Appeal Process

Parents or guardians that disagree with the Head of School's determination may appeal her decision by sending a written appeal to the Secretary of the Board within five school days after receipt of the Head of School's decision. The written appeal must be received no less than 24 hours prior to the Board's meeting where the appeal will be heard. The decision may be appealed on one or more of the following grounds:

- That new evidence is available that could not reasonably have been discovered prior to the hearing.
- That the student was not afforded due process.
- That the recommendation is not appropriate.
- That the recommendation was the result of bias or prejudice.

The Board shall hear the appeal and issue a final determination in a timely manner.

Resources for Alleged Victims

If an incident of harassment, intimidation, bullying, or hazing is reported, the Administrator or Head of School must provide the alleged victim with a written copy of the rights, protections and support services available to that student.

The Head of School shall establish procedures to protect the health and safety of students who are physically harmed as the result of bullying, harassment, intimidation, or hazing, including, when appropriate, procedures for contacting emergency medical services, law enforcement agencies, or both. Please contact the front office with questions about support services available to alleged victims.

Stop Bullying Resources

- <https://www.stopbullying.gov/>

- <https://www.stompoutbullying.org/>
- <https://notmykid.org/>
- <https://www.missingkids.org/netsmartz/home>
- <https://www.girlshealth.gov/>
- <https://www.ncpc.org/>
- <https://isafeventures.com/>
- www.haltabusektd.org

Definitions

Bullying

Bullying is any unwanted, aggressive, intentional behavior carried out by a person or group repeatedly and over time against a victim. Bullying requires an observed or perceived imbalance of power, such as physical strength, access to embarrassing information, or popularity, between the bully and victim.

May be verbal, social, or physical. Verbal bullying includes teasing, name-calling, taunting, and threatening. Social bullying includes attempting to damage the victim's relationships or reputation by excluding, spreading rumors, or defamation. Physical bullying includes hitting, kicking, spitting, tripping, pushing, taking or breaking the victim's property, and making mean or rude hand gestures.

Cyberbullying

Cyberbullying is any act of bullying committed by use of electronic technology or electronic communication devices, including telephone, social networking and other internet communications, on school computers, networks, forums and mailing lists, or other school owned property, and by means of an individual's personal electronic media and equipment.

Harassment

Harassment is an act in violation of ARS 13-2921 and 15-341(44). A person engages in harassment if, with intent to harass or with knowledge that the person is harassing another person, the person anonymously or otherwise contacts, communicates or causes a communication with another person by verbal, electronic, mechanical, telephonic or written means in a manner that harasses on school grounds or substantially disrupts the school environment.

Hazing

Hazing is an act in violation of ARS 13-1215 or 13-1216. A person commits hazing by intentionally, knowingly or recklessly, for the purpose of preinitiation activities, pledging, initiating, or affiliating a student into an organization or for the purpose of continuing, reinstating or enhancing a student's membership or status in an organization, causes, coerces or forces a student to engage in or endure any of the following:

1. Sexual humiliation or brutality, including forced nudity or an act of sexual penetration, or both.
2. Conduct or conditions, including physical or psychological tactics, that are reasonably calculated to cause severe mental distress to the student, including activities that are reasonably calculated to cause the student to harm themselves or others.
3. The consumption of any food, nonalcoholic liquid, alcoholic liquid, drug or other substance that poses a substantial risk of death, physical injury or emotional harm.
4. An act of restraint, confinement in a small space or significant sleep deprivation.
5. Conduct or conditions that violate a federal or state criminal law and that pose a substantial risk of death or physical injury.
6. Physical brutality or any other conduct or conditions that pose a substantial risk of death or physical injury, including whipping, beating, paddling, branding, electric shocking, placing harmful substances on the body, excessive exercise or calisthenics or unhealthy exposure to the elements.

A person commits hazing planning or organizing by doing any of the following:

1. With the intent to promote or aid the commission of hazing, the person agrees with one or more persons that at least one of them or another person will engage in hazing and one of the parties commits an overt act in furtherance of hazing.
2. Intentionally or knowingly engages in conduct that would constitute hazing if the attendant circumstances were as the person believes them to be.
3. Intentionally or knowingly does anything that, under the circumstances as the person believes them to be, is any step in a course of conduct planned to culminate in committing hazing.
4. Intentionally or knowingly engages in conduct that is intended to aid another to commit hazing, although the hazing is not committed or attempted by the other person.

"Organization" means an athletic team, association, order, society, corps, cooperative, club or other similar group that is affiliated with an educational institution and whose membership consists primarily of students enrolled at that educational institution.

"Student" means any person who is enrolled at an educational institution, any person who has been promoted or accepted for enrollment at an educational institution or any person who intends to enroll at or be promoted to an educational institution within the next twelve calendar months. The hazing prevention policy of the educational institution where a person has been

accepted for or promoted to enrollment, or where a person intends to enroll or be promoted to within the next twelve calendar months, shall be the effective policy. A person who meets the definition of a student for purposes of this paragraph shall continue to be defined as a student for purposes of this section until the person graduates, transfers, is promoted or withdraws from the educational institution.

Intimidation

Intimidation is intentional behavior by a student or group of students that places another student or group of students in fear of harm of person or property. Intimidation can be manifested emotionally or physically, either directly or indirectly, and by use of social media.

NO TOBACCO POLICY

1. Heartwood Montessori is a **NO SMOKING** facility.
2. Tobacco products are prohibited on school grounds, inside school buildings, in school parking lots or playing fields, in school buses or vehicles or at off-campus school sponsored events.
3. Heartwood Montessori does not allow any clothing or other materials that promote the use of tobacco.
4. "Tobacco" includes tobacco products, tobacco substitutes, electronic cigarettes, other chemical inhalation devices, or vapor products.

Tobacco Use By Students

If students are found to be in possession of or using Tobacco in any form while on school grounds, inside school buildings, in school parking lots or playing fields, in school buses or vehicles or at off-campus school sponsored events, they have violated Heartwood Montessori's No Tobacco Policy and are subject to disciplinary action. Potential consequences include:

- Student sent to office
- Parental notification
- Detention
- Parent notified to pick up student immediately
- Teacher conference
- Police citation with a fine
- Awareness of the dangers of smoking classes
- Administrator and parent conference
- In-school or out-of-school suspension*

SERIOUS OFFENSES

The Administrator or Head of School will report to local law enforcement agencies any suspected crime against a person or property that is a serious offense as defined in ARS 13-706 or that involves a deadly weapon or dangerous instrument or serious physical injury and any conduct that poses a threat of death or serious physical injury to employees, students or anyone on the property of the school.

Employees aware of any of these crimes must document and report the conduct to the Administrator or Head of School.

The Administrator or Head of School will notify the parent or guardian of each student who is involved in a suspected crime or any conduct that is described in this section, subject to the requirements of federal and state law.

Heartwood Montessori will maintain a record on any person who is disciplined pursuant to this section and, on request, shall make that record available to any public school, school district governing board or charter school governing body that is considering hiring that person.

DRESS CODE POLICY, UNIFORMS AND APPEARANCE

Policy

All students must come to school with a clean, neat appearance and be dressed in an appropriate fitting uniform. Heartwood Montessori recognizes and supports the desire of students for self-expression, that being said the school administration reserves the right to prohibit or modify any article of clothing, jewelry or makeup.

Parents will be notified by phone or email if a student is not in compliance with dress code. In the event that a student does not adhere to the dress code again, the parents will be asked to deliver appropriate items to the office in a timely manner.

Uniforms

Shirts:

- Approved, solid (forest) green color polo shirts.
- Solid long black or white T-shirts or camisoles worn underneath the uniform polos are acceptable as they provide extra warmth. A solid t-shirt/camisole that provides a layered look is an acceptable and modest style. These shirts should be black or white and contain no logos, prints, or characters.
- Polo shirts must extend below the waistband. The fit or style of the uniform polo may

not be altered. For instance, knots, bows, sequins or rubber bands may not be added to alter the uniform.

Pants, Shorts and Skorts:

- Students may wear cotton or cotton-blend chino or twill in only khaki or black solid-colored pants, shorts, cargo shorts, skorts or capris.
- Shorts and skorts must be fingertip length, meaning that the bottom of the short/skort may not be shorter than the tips of the student's fingers.
- Examples of unacceptable bottoms include, but are not limited to basketball shorts, sweatpants and blue jeans. Biker/dance shorts are not acceptable bottoms.

Dresses and skirts:

- Approved, Khaki or tan jumpers worn along with the provided Heartwood Montessori polo shirt.
- Polo collared dresses in the approved Heartwood Uniform green color.
- Dresses and skirts must always be worn with bike shorts, cartwheel shorts or tights, in solid black, white, or khaki tan color.
- Dresses and skirts must be fingertip length, meaning that the bottom of the dress/skirt may be no shorter than the tips of the student's fingers.
- Solid leggings or tights may be worn under dresses or skirts in cold weather. These should be black or white and contain no logos, prints, or characters.

Outerwear:

- No prints, characters, or logos allowed. Sweaters or jackets should be a solid color.
- On very cold days, any heavy solid color jacket may be worn outside, but for inside warmth, students should bring a solid color sweater or jacket.

Footwear:

- Acceptable footwear are athletic shoes that must be close-toed.
- Examples of unacceptable footwear include rolling shoes, slippers, flip-flops, light up shoes, character shoes, crocs, and boots. NO BOOTS.
- Leggings and tights are to be of a solid color, with no designs and with no characters represented.
- Socks should be of a solid color, with no designs and with no characters represented.

General Appearance:

- Students must be well groomed.
- Nails must be trimmed, clean and not so long as to inhibit the necessary work in the classroom.
- Hair must be brushed and pulled away from the face.
- Extreme haircuts or words/designs shaved into the hair are not acceptable.
- Hair must be of a natural color.
- Make-up use for Secondary students should be light/modest. A written notice will be

given to students who do not follow guidelines.

- Students are allowed to wear jewelry, including necklaces, rings, and earrings. Jewelry should be modest and not distracting to the learning environment. The school reserves the right to ask students to remove any jewelry deemed inappropriate or disruptive.
- Uniforms must be neat, clean, in good repair, and appropriately sized. Tight clothing, excessively baggy clothing or clothing with frayed bottoms and holes is not permitted.
- All students are to wear their school uniforms on going outs during the school day. However, students do not need to wear uniforms for school trips.

TECHNOLOGY & INTERNET

Use of Electronics

We ask parents to not use cell phones in any way, including texting or gaming, when at Heartwood Montessori. Arrival and dismissal are important transition times for students. The staff also pledge to use cell phones only when on breaks and away from the students.

The use of cell phones, tablets, Apple watches, Fitbits and other such personal electronic devices are not appropriate for the school environment and are to be left at home on a daily basis. If such devices or items are brought to school, they will be stored in administrative offices until the end of the day when they are returned to the student. There is a cell phone/watch drop off at the front desk.

Internet Safety Policy

Heartwood Montessori provides technology, internet services, and wired and wireless networking services (collectively, “school technology”) to students and employees, and other authorized persons, for educational purposes, including classroom activities, career or professional development, school operations, research and other work-related purposes. School technology may not be used for any other purposes.

There will be automatic access to school technology with parental options to opt out for students. Please contact the front office for additional information.

Monitoring of School Technology

All data stored or transmitted on school technology may be monitored by authorized

employees. Users have no reasonable expectation of privacy with respect to such data. In addition, electronic information created by employees on school computers may be subject to state public records laws.

FERPA

All employees shall ensure the same rules of confidentiality for students' educational records under the Family Educational Rights and Privacy Act ("FERPA") 20 U.S.C 1232(g) apply to student records stored or transmitted via school technology. The Head of School is responsible for developing safeguards to protect students' privacy when sharing records with other schools or public agencies.

Children's Internet Protection Act (CIPA)

The Children's Internet Protection Act (CIPA) is a federal law enacted by Congress to address concerns about access to offensive content over the internet on school and library computers. Heartwood Montessori participates in the E-Rate program and is therefore subject to this law. It is the policy of Heartwood Montessori to: (a) prevent user access over its computer network to, or transmission of, inappropriate material via internet, electronic mail, or other forms of direct electronic communications; (b) prevent unauthorized access and other unlawful online activity; (c) prevent unauthorized online disclosure, use, or dissemination of personal identification information of minors; and (d) comply with CIPA.

Access to Inappropriate Material

To the extent practical, technology protection measures (or "Internet filters") shall be used to block or filter Internet, or other forms of electronic communications, access to inappropriate information. Specifically, as required by CIPA, blocking shall be applied to visual depictions of material deemed obscene or to any material deemed harmful to minors. Students and employees are prohibited from searching, viewing, downloading, uploading, sending, or requesting offensive or illegal material on school technology, and doing so will subject the individual(s) to appropriate disciplinary and/or legal action.

Inappropriate Network Usage

To the extent practical, steps shall be taken to promote the safety and security of users of school technology when using electronic mail, chat rooms, instant messaging, and other forms of direct electronic communications. Specifically, as required by CIPA, prevention of inappropriate network usage includes: (a) unauthorized access, including so-called 'hacking,' and other unlawful activities; and (b) unauthorized disclosure, use, and dissemination of personal identification information regarding minors.

Violations of the Internet & Technology Policies

Parents and students will be provided with a code of conduct at the beginning of each year. The code of conduct will be on display in learning spaces in order for students to best understand what is expected of them behaviorally. Students are expected to follow the code of conduct. If the code of conduct is not followed, the following protocol will be implemented by the guides:

- First failure to follow the code of conduct: the guide will politely remind the student or students that the program uses a code of conduct, and the guide will explain the expectation from the code of conduct that is not being met. The guide will also explain the natural consequences of not meeting that expectation should the student or students fail to meet it again in the near future.
- Second failure to follow the code of conduct: the guide will implement the natural consequence or allow it to occur. At this point, a brief email explaining the situation should be sent to parents of the student, the Lead Guide for the secondary program and the Head of School.
- Third failure to follow the code of conduct: a meeting will need to take place with the student, parents of the student, the Lead Guide for the secondary program, the Head of School, and Executive Director in order to resolve the issue constructively, which may include school suspension or expulsion.

Academic Integrity

All work that is submitted to meet any school and/or program requirements must represent the work of the individual student. To help maintain an atmosphere of mutual trust and confidence among students and guides and to ensure that each student's learning is evaluated solely according to his or her own merits, any form of academic dishonesty is prohibited. Academic dishonesty includes, but is not limited to:

Misrepresentation

- Allowing another person to take a quiz, exam, or similar evaluation for you. • Unauthorized collaboration in providing or requesting assistance, such as sharing information on an academic exercise.

Plagiarism

- Submitting, as your own, through purchase or otherwise, part of or an entire work produced verbatim by someone else.
- Paraphrasing ideas, data, or writing from another source without properly acknowledging the source
- Unauthorized transfer of documents or use of someone else's computer file or electronic material, as your own.
- All work students produce should be their own authentic work. COA does not consider any work generated from an artificial intelligence (AI) website or generator

(such as ChatGPT) to be a student's own authentic work. Like any other outside sources used in a student's work, any use of an AI generator included in student work should be properly cited.

****Please note that Heartwood Secondary Program utilizes software to aid in the detection of AI generated work. Evidence of AI usage in student work submissions without proper citation may result in the student being required to resubmit the assignment according to the policy outlined below, and/or meet with his/her teacher to demonstrate mastery of the content suspected of AI usage.**

Facilitating Academic Dishonesty

- Taking a quiz, exam, or similar evaluation in place of another person.
- Allowing another student to copy from you. Providing material or other information to another student with the knowledge that such assistance could be used in any of the violations stated above.
- Participating in any action that compromises the integrity of the academic standards of the school; assisting another to commit an act of academic dishonesty.

Offenses/Consequences:

Incidents of cheating/plagiarism will be handled as follows:

- 1st offense - the student will meet with the Guide and will establish an understanding of what they did wrong and how to avoid it in the future. The student will submit a written explanation of their understanding in order to remain transparent. Then they will be allowed to redo the assignment for partial credit. Parents and school Administration will be notified of the offense.
- 2nd offense - The student will meet with the Guide and Administration to establish an understanding of what they did wrong and how to avoid it in the future. No credit will be given for the assignment. Parents and school Administration will be notified of the offense.
- 3rd offense - The Guide and Administration request a meeting with the student and parents. The student will fail the course and be required to make up the course for the credit.

* In an incident where a student turns in more than three assignments at one time that involved cheating or have been plagiarized, 3rd offense rules apply.

Students found cheating on an exam will receive an automatic zero, which will result in an enormous and negative impact on the student's final grade on their transcript.

Cheating includes:

Operating any electronic device once the exam has started.
Accessing any website away from their exam module.

Using any unapproved notes.
Any other action used to gain an unfair advantage.

Prevention:

Cheating / plagiarism policy will be included in the student handbook and the orientation course. Guides in the secondary program will provide a brief unit on plagiarism and academic integrity in order to enable students to better define it and apply it in situations they face. Students will be required to pass a quiz demonstrating their knowledge of and ability to apply the academic integrity policy.

Education, Supervision and Monitoring

It shall be the responsibility of all employees to educate, supervise and monitor appropriate usage of the online computer network and access to the Internet in accordance with this policy, CIPA, the Neighborhood Children's Internet Protection Act, and the Protecting Children in the 21st Century Act. Procedures for the disabling or otherwise modifying any technology protection measures shall be the responsibility of the Head of School or designated representatives.

The Secondary Program Director or designated representatives will provide age appropriate training for students who use school technology. The training provided will be designed to promote Heartwood Montessori's commitment to:

- The standards and acceptable use of school technology as set forth in this Internet Safety Policy;
- Student safety with regard to safety on the Internet; appropriate behavior while online, on social networking web sites, and in chat rooms; and cyberbullying awareness and response.
- Compliance with the E-rate requirements of CIPA.

Following receipt of this training, the student will acknowledge in writing that he/she received the training, understood it, and will follow the provisions of Heartwood Montessori's acceptable use policies.

PEST CONTROL PROCEDURES

Heartwood Montessori posts a notice of pesticide application 48 hours prior to application on school property. Pesticide is applied during non-school hours. Safety data sheets including chemical content, pest control log of dates and times of application and posting notices are available for inspection at the front desk.

CHILD ABUSE REPORTING

Per state law, school employees must report suspected cases of abuse, neglect, non-accidental injury, or sexual offenses against children to Child Protective Services (CPS) and/or local law enforcement agencies as well as to the Head of School or Assistant Head of School. Where parents are the alleged abusers, school personnel are not to notify parents; Child Protective Services and law enforcement agencies are responsible for notification. Should the alleged perpetrator be other than a member of the child's family, school personnel shall follow reasonable notification procedures. Any child who is a suspected abuse victim shall be made available to either CPS or the Police Department for questioning. The investigating agency will determine whether school personnel should be with the child during questioning. The CPS worker and/or the police may interview the child and all other children residing in the home on school grounds outside of the presence of school personnel. They may conduct interviews of the child without permission or notice to the parents where the suspected perpetrator is a family member. CPS has the authority to obtain school records upon written request. State law protects individuals required to report suspected abuse from civil and criminal liability.

To report suspected abuse and neglect of children call the Arizona Department of Child Safety Child Abuse Hotline at 1-888-SOS-CHILD (1-888-767-2445). For any emergencies, call 911. For more information on reporting child abuse visit AZDCS.GOV.

MCKINNEY-VENTO HOMELESS ASSISTANCE ACT

Every homeless student shall have access to the same educational opportunities as students who are not homeless. A student identified as homeless has the right to immediate enrollment, the opportunity to remain enrolled in their school of origin, selection of their school of choice, participation in programs for which they are eligible, transportation assistance and dispute resolution.

Contact Heartwood Montessori's McKinney-Vento liaison for homeless status qualification or information. For additional information visit www.azed.gov/homeless/

NON-DISCRIMINATION AND NON-RETALIATION POLICY

Heartwood Montessori must maintain an educational environment for its students that is free from unlawful discrimination and harassment. Heartwood Montessori will promptly

investigate allegations of discrimination and discipline individuals found to be in violation of the school's equal educational opportunities policies.

Heartwood Montessori will not tolerate retaliation against any person who files a good-faith complaint of discrimination or harassment, regardless of the outcome of the complaint. The school will not tolerate retaliation against any person who participates in the investigation of a harassment or discrimination complaint against another person. Any perceived retaliation should be immediately reported to the school for investigation.

If you believe your child has been subjected to unlawful discrimination or harassment, please contact Heartwood Montessori at (480) 599-0137.

TITLE IX

Title IX of the Education Amendments of 1972 (Title IX) prohibits discrimination based on sex in education programs and activities that receive federal financial assistance. No person shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity offered by Heartwood Montessori, including but not limited to admissions or employment.

Questions about Title IX may be referred to Heartwood Montessori's Title IX Coordinator:

Sherri Sampson
207 N Mesa Drive
Mesa, AZ 85201
(480) 599-0137
Info@heartwoodaz.org

How to Report or File a Complaint of Sex Discrimination

Any person may report sex discrimination, including sexual harassment, regardless of whether the person is the alleged victim of the conduct. Reports may be made in person, by telephone, by email, or by mail to the Title IX Coordinator at any time. Complaints of sex discrimination that is not sexual harassment will be handled promptly and equitably pursuant to Heartwood Montessori's procedures for resolving student or employee grievances. Complaints of sexual harassment will be handled using the grievance procedures set forth below.

How to Report or File a Formal Complaint of Sexual Harassment

Any person who is participating in or attempting to participate in Heartwood Montessori's educational program or activity, including a person who is alleged to be the victim of sexual harassment may report sexual harassment, in person, by mail, by telephone or by email to the

Title IX Coordinator at any time. The report must include the nature of alleged violation; names of persons responsible for the alleged violation (when known), and any other relevant background information. The person submitting the complaint or the Title IX Coordinator, but not a third-party, may sign a formal complaint. The complainant and the respondent are the parties to any formal complaint, even if it is signed by the Title IX Coordinator.

Heartwood Montessori will also respond to alleged sex discrimination whenever any employee has actual knowledge of potential sex discrimination or allegations of sex discrimination. Employees must report such knowledge immediately to the Title IX Coordinator.

Grievance Process for Formal Complaints of Sexual Harassment

Heartwood Montessori's grievance procedures are intended to provide for the prompt and equitable resolution of student and employee complaints alleging any action that would be prohibited by Title IX and a grievance process that complies with 34 C.F.R. § 106.45 for formal complaints.

Heartwood Montessori's grievance process will treat complainants and respondents equitably by providing remedies to a complainant where a determination of responsibility for sexual harassment has been made against the respondent, and by following a grievance process that complies with this section before the imposition of any disciplinary sanctions or other actions that are not supportive measures against a respondent. Remedies are designed to restore or preserve equal access to the recipient's education program or activity. Such remedies may include supportive measures and/or disciplinary action.

When investigating a complaint, Heartwood Montessori will engage in an objective evaluation of all relevant evidence—including both inculpatory and exculpatory evidence—and provide that credibility determinations may not be based on a person's status as a complainant, respondent, or witness.

Any Title IX Coordinator, investigator, decision-maker, or any person designated to facilitate an informal resolution process, must not have a conflict of interest or bias for or against complainants or respondents generally or an individual complainant or respondent. All Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process must receive training on the definition of sexual harassment in 34 C.F.R. § 106.30, the scope of Heartwood Montessori's education program or activity, how to conduct an investigation and grievance process including hearings, appeals, and informal resolution processes, as applicable, and how to serve impartially, including by avoiding prejudgment of the facts at issue, conflicts of interest, and bias.

Heartwood Montessori will ensure that decision-makers receive training on any technology to be used at a live hearing and on issues of relevance of questions and evidence, including when questions and evidence about the complainant's sexual predisposition or prior sexual behavior are not relevant. Heartwood Montessori will ensure that investigators receive training on issues of relevance to create an investigative report that fairly summarizes relevant evidence. Any

materials used to train Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process, must not rely on sex stereotypes and must promote impartial investigations and adjudications of formal complaints of sexual harassment.

Respondent is not responsible for the alleged conduct until a determination regarding responsibility is made at the conclusion of the grievance process.

Students found to have violated Title IX will be referred for potential disciplinary action. Consequences will vary depending on the nature and severity of the actions, and potential implications for future harm. Consequences are meant to promote the safety of the school community by addressing dangerous student behavior. Potential consequences include:

- Mandatory notification to parent or guardian
- Detention
- Teacher conference
- Administrator and parent conference
- In-school or out-of-school suspension*
- Expulsion*

**Suspension or expulsion of students in kindergarten through fourth grade will only be issued for violations outlined in ARS 15-843 (k).*

The standard of evidence to be used to determine responsibility is the preponderance of the evidence standard. The same standard of evidence will be used for formal complaints against students as for formal complaints against employees. The same standard of evidence will apply to all formal complaints of sexual harassment.

Heartwood Montessori will not require, allow, rely upon, or otherwise use questions or evidence that constitute, or seek disclosure of, information protected under a legally recognized privilege, unless the person holding such privilege has waived the privilege.

How Heartwood Montessori Will Respond

Heartwood Montessori's response to complaints of sex discrimination or sexual harassment will treat complainants and respondents equitably by offering supportive measures and a grievance process before the imposition of any disciplinary sanctions or other actions against a respondent. The Title IX Coordinator will promptly contact the complainant to discuss the availability of supportive measures, consider the complainant's wishes with respect to supportive measures, inform the complainant of the availability of supportive measures with or without the filing of a formal complaint, and explain to the complainant the process for filing a formal complaint.

Supportive Measures

Supportive measures will include non-disciplinary, non-punitive individualized services offered as appropriate, as reasonably available, and without fee or charge to the complainant or the respondent before or after the filing of a formal complaint or where no formal complaint has been

filed. Such measures are designed to restore or preserve equal access to the recipient's education program or activity without unreasonably burdening the other party, including measures designed to protect the safety of all parties or the recipient's educational environment, or deter sexual harassment. Supportive measures may include counseling, extensions of deadlines or other course-related adjustments, modifications of work or class schedules, campus escort services, mutual restrictions on contact between the parties, changes in work locations, leaves of absence, increased security and monitoring of certain areas of the campus, and other similar measures.

Heartwood Montessori will maintain as confidential any supportive measures provided to the complainant or respondent, to the extent that maintaining such confidentiality would not impair the ability of Heartwood Montessori to provide the supportive measures. The Title IX Coordinator is responsible for coordinating the effective implementation of supportive measures.

Notice Of Allegations

Upon receipt of a formal complaint, Heartwood Montessori will provide the following written notice to the parties who are known:

1. Notice of Heartwood Montessori's grievance process that complies with this section, including any informal resolution process.
2. Notice of the allegations of sexual harassment potentially constituting sexual harassment as defined herein, including sufficient details known at the time and with sufficient time to prepare a response before any initial interview. Sufficient details include the identities of the parties involved in the incident, if known, the conduct allegedly constituting sexual harassment, and the date and location of the alleged incident, if known. The written notice must include a statement that the respondent is presumed not responsible for the alleged conduct and that a determination regarding responsibility is made at the conclusion of the grievance process. The written notice must inform the parties that they may have an advisor of their choice, who may be, but is not required to be, an attorney, and may inspect and review evidence. The written notice must inform the parties of any provision in Heartwood Montessori's code of conduct that prohibits knowingly making false statements or knowingly submitting false information during the grievance process.
3. If, in the course of an investigation, Heartwood Montessori decides to investigate allegations about the complainant or respondent that are not included in the notice, Heartwood Montessori must provide notice of the additional allegations to the parties whose identities are known.

Dismissal of a Formal Complaint

Heartwood Montessori must investigate the allegations in a formal complaint. If the conduct alleged in the formal complaint would not constitute sexual harassment as defined herein even if proved, did not occur in Heartwood Montessori's education program or activity, or did not occur

against a person in the United States, then Heartwood Montessori must dismiss the formal complaint with regard to that conduct for purposes of sexual harassment under Title IX; such a dismissal does not preclude action under another provision of Heartwood Montessori's code of conduct.

Heartwood Montessori may dismiss the formal complaint or any allegations therein, if at any time during the investigation or hearing: A complainant notifies the Title IX Coordinator in writing that the complainant would like to withdraw the formal complaint or any allegations therein; the respondent is no longer enrolled or employed by Heartwood Montessori; or specific circumstances prevent Heartwood Montessori from gathering evidence sufficient to reach a determination as to the formal complaint or allegations therein.

Upon a dismissal, Heartwood Montessori must promptly send written notice of the dismissal and reason(s) therefore simultaneously to the parties.

Consolidation of Formal Complaints

Heartwood Montessori may consolidate formal complaints as to allegations of sexual harassment against more than one respondent, or by more than one complainant against one or more respondents, or by one party against the other party, where the allegations of sexual harassment arise out of the same facts or circumstances.

Investigation of a Formal Complaint

When investigating a formal complaint and throughout the grievance process, Heartwood Montessori must ensure that the burden of proof and the burden of gathering evidence sufficient to reach a determination regarding responsibility rest on Heartwood Montessori and not on the parties provided that Heartwood Montessori cannot access, consider, disclose, or otherwise use a party's records that are made or maintained by a physician, psychiatrist, psychologist, or other recognized professional or paraprofessional acting in the professional's or paraprofessional's capacity, or assisting in that capacity, and which are made and maintained in connection with the provision of treatment to the party, unless Heartwood Montessori obtains that party's voluntary, written consent to do so for a grievance process under this section (if a party is not an "eligible student," as defined in 34 CFR 99.3, then the recipient must obtain the voluntary, written consent of a "parent," as defined in 34 CFR 99.3);

Heartwood Montessori must provide an equal opportunity for the parties to present witnesses, including fact and expert witnesses, and other inculpatory and exculpatory evidence.

Heartwood Montessori must not restrict the ability of either party to discuss the allegations under investigation or to gather and present relevant evidence.

Heartwood Montessori must provide the parties with the same opportunities to have others present during any grievance proceeding, including the opportunity to be accompanied to any related meeting or proceeding by the advisor of their choice, who may be, but is not required to be, an attorney, and not limit the choice or presence of advisor for either the complainant or

respondent in any meeting or grievance proceeding; however, Heartwood Montessori may establish restrictions regarding the extent to which the advisor may participate in the proceedings, as long as the restrictions apply equally to both parties.

Heartwood Montessori must provide, to a party whose participation is invited or expected, written notice of the date, time, location, participants, and purpose of all hearings, investigative interviews, or other meetings, with sufficient time for the party to prepare to participate.

Heartwood Montessori must provide both parties an equal opportunity to inspect and review any evidence obtained as part of the investigation that is directly related to the allegations raised in a formal complaint, including the evidence upon which Heartwood Montessori does not intend to rely in reaching a determination regarding responsibility and inculpatory or exculpatory evidence whether obtained from a party or other source, so that each party can meaningfully respond to the evidence prior to conclusion of the investigation. Prior to completion of the investigative report, Heartwood Montessori must send to each party and the party's advisor, if any, the evidence subject to inspection and review in an electronic format or a hard copy, and the parties must have at least 10 days to submit a written response, which the investigator will consider prior to completion of the investigative report. Heartwood Montessori must make all such evidence subject to the parties' inspection and review available at any hearing to give each party equal opportunity to refer to such evidence during the hearing, including for purposes of cross-examination.

Heartwood Montessori must create an investigative report that fairly summarizes relevant evidence and, at least 10 days prior to a hearing (if a hearing is required or otherwise provided) or other time of determination regarding responsibility, send to each party and the party's advisor, if any, the investigative report in an electronic format or a hard copy, for their review and written response.

Hearings

Heartwood Montessori's grievance process does not provide for a hearing. After Heartwood Montessori has sent the investigative report to the parties and before reaching a determination regarding responsibility, the decision-maker(s) must afford each party the opportunity to submit written, relevant questions that a party wants asked of any party or witness, provide each party with the answers, and allow for additional, limited follow-up questions from each party. Questions and evidence about the complainant's sexual predisposition or prior sexual behavior are not relevant, unless such questions and evidence about the complainant's prior sexual behavior are offered to prove that someone other than the respondent committed the conduct alleged by the complainant, or if the questions and evidence concern specific incidents of the complainant's prior sexual behavior with respect to the respondent and are offered to prove consent. The decision-maker(s) must explain to the party proposing the questions any decision to exclude a question as not relevant.

Determination Regarding Responsibility

The decision-maker(s), who cannot be the same person(s) as the Title IX Coordinator or the

investigator(s), must issue a written determination regarding responsibility. To reach this determination, the Heartwood Montessori must apply the preponderance of the evidence standard.

The written determination must include identification of the allegations potentially constituting sexual harassment; a description of the procedural steps taken from the receipt of the formal complaint through the determination, including any notifications to the parties, interviews with parties and witnesses, site visits, methods used to gather other evidence, and hearings held; findings of fact supporting the determination; conclusions regarding the application of Heartwood Montessori's code of conduct to the facts; a statement of, and rationale for, the result as to each allegation, including a determination regarding responsibility, any disciplinary sanctions Heartwood Montessori imposes on the respondent, and whether remedies designed to restore or preserve equal access to Heartwood Montessori's education program or activity will be provided to the complainant; and Heartwood Montessori's procedures and permissible bases for the complainant and respondent to appeal.

Heartwood Montessori must provide the written determination to the parties simultaneously. The determination regarding responsibility becomes final either on the date that Heartwood Montessori provides the parties with the written determination of the result of the appeal, if an appeal is filed, or if an appeal is not filed, the date on which an appeal would no longer be considered timely.

The Title IX Coordinator is responsible for effective implementation of any remedies.

Appeals

Heartwood Montessori will offer both parties an appeal from a determination regarding responsibility, and from Heartwood Montessori's dismissal of a formal complaint or any allegations therein, on the following bases: procedural irregularity that affected the outcome of the matter; new evidence that was not reasonably available at the time the determination regarding responsibility or dismissal was made, that could affect the outcome of the matter; and the Title IX Coordinator, investigator(s), or decision-maker(s) had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that affected the outcome of the matter. Heartwood Montessori may offer an appeal equally to both parties on additional bases.

For all appeals, Heartwood Montessori will: notify the other party in writing when an appeal is filed and implement appeal procedures equally for both parties; ensure that the decision-maker(s) for the appeal is not the same person as the decision-maker(s) that reached the determination regarding responsibility or dismissal, the investigator(s), or the Title IX Coordinator; ensure that the decision-maker(s) for the appeal complies with the preponderance of the evidence standard; give both parties a reasonable, equal opportunity to submit a written statement in support of, or challenging, the outcome; issue a written decision describing the result of the appeal and the rationale for the result; and provide the written decision simultaneously to both parties.

Informal Resolution

Heartwood Montessori will not require as a condition of enrollment or continuing enrollment, or employment or continuing employment, or enjoyment of any other right, waiver of the right to an investigation and adjudication of formal complaints of sexual harassment.

Heartwood Montessori will not require the parties to participate in an informal resolution process and will not offer an informal resolution process unless a formal complaint is filed. However, at any time prior to reaching a determination regarding responsibility Heartwood Montessori may facilitate an informal resolution process, such as mediation, that does not involve a full investigation and adjudication, provided that Heartwood Montessori: (i) provides to the parties a written notice disclosing the allegations, the requirements of the informal resolution process including the circumstances under which it precludes the parties from resuming a formal complaint arising from the same allegations, provided, however, that at any time prior to agreeing to a resolution, any party has the right to withdraw from the informal resolution process and resume the grievance process with respect to the formal complaint, and any consequences resulting from participating in the informal resolution process, including the records that will be maintained or could be shared; (ii) obtains the parties' voluntary, written consent to the informal resolution process; and (iii) does not offer or facilitate an informal resolution process to resolve allegations that an employee sexually harassed a student.

Recordkeeping

Heartwood Montessori will maintain for a period of seven years records of each sexual harassment investigation, including any determination regarding responsibility and any audio or audiovisual recording or transcript, (i) any disciplinary sanctions imposed on the respondent, and any remedies provided to the complainant designed to restore or preserve equal access to Heartwood Montessori's education program or activity; (ii) any appeal and the result therefrom; (iii) any informal resolution and the result therefrom; and (iv) all materials used to train Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process. Heartwood Montessori will make these training materials publicly available on its website.

Heartwood Montessori will create, and maintain for a period of seven years, records of any actions, including any supportive measures, taken in response to a report or formal complaint of sexual harassment. In each instance, Heartwood Montessori will document the basis for its conclusion that its response was not deliberately indifferent, and document that it has taken measures designed to restore or preserve equal access to Heartwood Montessori's education program or activity. If Heartwood Montessori does not provide a complainant with supportive measures, then Heartwood Montessori will document the reasons why such a response was not clearly unreasonable in light of the known circumstances. The documentation of certain bases or measures does not limit Heartwood Montessori in the future from providing additional explanations or detailing additional measures taken.

Retaliation

Retaliation is prohibited. Heartwood Montessori nor any person may intimidate, threaten, coerce, or discriminate against any individual for the purpose of interfering with any right or privilege secured by Title IX, or because the individual has made a report or complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing. Intimidation, threats, coercion, or discrimination, including charges against an individual for code of conduct violations that do not involve sex discrimination or sexual harassment, but arise out of the same facts or circumstances as a report or complaint of sex discrimination, or a report or formal complaint of sexual harassment, for the purpose of interfering with any right or privilege secured by Title IX constitutes retaliation. Complaints alleging retaliation may be filed according to the grievance procedures for sex discrimination.

The exercise of rights protected under the First Amendment does not constitute retaliation.

Charging an individual with a code of conduct violation for making a materially false statement in bad faith in the course of a grievance proceeding under this part does not constitute retaliation, provided, however, that a determination regarding responsibility, alone, is not sufficient to conclude that any party made a materially false statement in bad faith.

Heartwood Montessori will keep confidential the identity of any individual who has made a report or complaint of sex discrimination, including any individual who has made a report or filed a formal complaint of sexual harassment, any complainant, any individual who has been reported to be the perpetrator of sex discrimination, any respondent, and any witness, except as may be permitted by the FERPA statute, 20 U.S.C. 1232g, or FERPA regulations, 34 CFR part 99, or as required by law, or to carry out the purposes of 34 CFR part 106, including the conduct of any investigation, hearing, or judicial proceeding arising thereunder.

Definitions

“Sexual harassment” means conduct on the basis of sex that satisfies one or more of the following:

1. An employee of Heartwood Montessori conditioning the provision of an aid, benefit, or service of Heartwood Montessori on an individual's participation in unwelcome sexual conduct;
2. Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the Heartwood Montessori 's education program or activity; or
3. “Sexual assault” as defined in 20 U.S.C. 1092(f)(6)(A)(v), “dating violence” as defined in 34 U.S.C. 12291(a)(10), “domestic violence” as defined in 34 U.S.C. 12291(a)(8), or “stalking” as defined in 34 U.S.C. 12291(a)(30).

ASBESTOS HAZARD EMERGENCY RESPONSE ACT

Heartwood Montessori has developed an Asbestos Management Plan pursuant to the Asbestos Hazard Emergency Response Act (AHERA) 15 U.S.C. §§ 2641-2656, a copy of which is located at the front office and available for public review. Heartwood Montessori's Asbestos Management Plan includes information on inspections and any response actions taken or planned regarding asbestos in the school. Please contact the front office at (480) 599-0137 for further information about Heartwood Montessori's Asbestos Management Plan.

ANNUAL NOTIFICATION OF A.R.S. 15-117-SURVEYS; PARENTAL PERMISSION AND INFORMED CONSENT

At least seven days before administering any survey to a student that solicits personal information about the student regarding information listed below and in A.R.S. 15-117(A), Heartwood Montessori will provide a copy of the survey to the student's parent or guardian along with a written informed consent form and shall obtain written informed consent from the student's parent or guardian for the student to participate in the survey. The student's parent or guardian may at any time revoke consent for the student to participate in the survey. For any student who is at least eighteen years of age, the permission or consent that would otherwise be required from the student's parent or guardian is required only from the student.

1. Critical appraisals of another person with whom a pupil has a close relationship.
2. Gun or ammunition ownership.
3. Illegal, antisocial or self-incriminating behavior.
4. Income or other financial information.
5. Legally recognized privileged or analogous relationships, such as relationships with a lawyer, physician or member of the clergy.
6. Medical history or medical information.
7. Mental health history or mental health information.
8. Political affiliations, opinions or beliefs.

9. Student biometric information.
10. The quality of home interpersonal relationships.
11. Religious practices, affiliations or beliefs.
12. Self-sufficiency as it pertains to emergency, disaster and essential services interruption planning.
13. Sexual behavior or attitudes.
14. Voting history.

This policy does not apply to:

1. Mental health screening pursuant to A.R.S. 15-104 or the identification of or programming for children with disabilities or gifted pupils.
2. Class instruction, discussion or assignments on subjects within the purview of the course.
3. Any exam administered by a nationally recognized college entrance or career readiness exam provider that a student takes on public school property, regardless of whether the exam is taken during the school day.
4. Any survey conducted or implemented by the Arizona criminal justice commission if, at least seven days before the survey is administered to a student, Heartwood Montessori provides the student's parent or guardian with a paper or electronic copy of the survey or electronic access to the survey.
5. Any method of surveying a student that is conducted because a person has a reasonable belief that a minor is or has been a victim of abuse pursuant to A.R.S. 13-3620.

Heartwood Montessori will provide an alternative educational activity for any student whose parent or guardian does not consent for that student to participate in the survey.

On request, Heartwood Montessori will provide any available information in a timely manner to the parent or guardian of a student regarding a survey administered pursuant to this policy, including:

1. The name of the survey.
2. The date or dates on which the survey will be administered.
3. The method or methods of administering the survey.
4. The amount of time required to administer the survey.
5. The type of information collected by the survey.
6. The reasons for administering the survey.

ANNUAL NOTIFICATION OF RIGHTS UNDER THE PROTECTION OF PUPIL RIGHTS AMENDMENT (PPRA)

PPRA affords parents of elementary and secondary students certain rights regarding the conduct of surveys, collection, and use of information for marketing purposes, and certain physical exams. These include, but are not limited to, the right to:

Consent before students are required to submit to a survey that concerns one or more of the following protected areas (“protected information survey”) if the survey is funded in whole or in part by a program of the U.S. Department of Education (ED) -

1. Political affiliations or beliefs of the student or student’s parent;
2. Mental or psychological problems of the student or student’s family;
3. Sex behavior or attitudes;
4. Illegal, anti-social, self-incriminating, or demeaning behavior;
5. Critical appraisals of others with whom respondents have close family relationships;
6. Legally recognized privileged relationships, such as with lawyers, doctors, or ministers;
7. Religious practices, affiliations, or beliefs of the student or student’s parent; or
8. Income, other than as required by law to determine program eligibility.

Receive notice and an opportunity to opt a student out of –

1. Any other protected information survey, regardless of funding;
2. Any non-emergency, invasive physical exam or screening required as a condition of attendance, administered by Heartwood Montessori or its agent, and not necessary to protect the immediate health and safety of a student, except for hearing, vision, or scoliosis screenings, or any physical exam or screening permitted or required under State law; and
3. Activities involving collection, disclosure, or use of personal information collected from students for marketing or to sell or otherwise distribute the information to others. (This does not apply to the collection, disclosure, or use of personal information collected from students for the exclusive purpose of developing, evaluating, or providing educational products or services for, or to, students or educational institutions.)

Inspect upon request and before administration or use –

1. Protected information surveys of students and surveys created by a third party;
2. Instruments used to collect personal information from students for any of the above marketing, sales, or other distribution purposes; and
3. Instructional material used as part of the educational curriculum.

These rights transfer from the parents to a student who is 18 years old or an emancipated minor under State law.

Heartwood Montessori has developed and adopted policies, in consultation with parents, regarding these rights, as well as arrangements to protect student privacy in the administration of protected information surveys and the collection, disclosure, or use of personal information for marketing, sales, or other distribution purposes. Heartwood Montessori will directly notify parents of these policies at least annually at the start of each school year and after any substantive changes. Heartwood Montessori will also directly notify, such as through U.S. Mail or email, parents of students who are scheduled to participate in the specific activities or surveys noted below and will provide an opportunity for the parent to opt his or her child out of participation of the specific activity or survey. Heartwood Montessori will make this notification to parents at the beginning of the school year if Heartwood Montessori has identified the specific or approximate dates of the activities or surveys at that time. For surveys and activities scheduled after the school year starts, parents will be provided reasonable notification of the planned activities and surveys listed below and be provided an opportunity to opt their child out of such activities and surveys. Parents will also be provided an opportunity to review any pertinent surveys. Following is a list of the specific activities and surveys covered under this direct notification requirement:

1. Collection, disclosure, or use of personal information collected from students for marketing, sales, or other distribution.
2. Administration of any protected information survey not funded in whole or in part by ED.
3. Any non-emergency, invasive physical examination or screening as described above.

Parents who believe their rights have been violated may file a complaint with:

Student Privacy Policy Office
U.S. Department of Education
400 Maryland Avenue, SW
Washington, D.C. 20202

Annual Notification of Rights Under FERPA

The Family Educational Rights and Privacy Act (FERPA) affords parents and students who are 18

years of age or older ("eligible students") certain rights with respect to the student's education records. These rights are:

1. The right to inspect and review the student's education records within 45 days after the day Heartwood Montessori ("School") receives a request for access.

Parents or eligible students who wish to inspect their child's or their education records should submit to the Head of School a written request that identifies the records they wish to inspect. The Head of School will make arrangements for access and notify the parent or eligible student of the time and place where the records may be inspected.

2. The right to request the amendment of the student's education records that the parent or eligible student believes are inaccurate, misleading, or otherwise in violation of the student's privacy rights under FERPA.

Parents or eligible students who wish to ask the School to amend their child's or their education record should write the Head of School, clearly identify the part of the record they want changed, and specify why it should be changed. If the School decides not to amend the record as requested by the parent or eligible student, the School will notify the parent or eligible student of the decision and of their 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.

3. The right to provide written consent before the School discloses personally identifiable information (PII) from the student's education records, except to the extent that FERPA authorizes disclosure without consent.

One exception, which permits disclosure without consent, is disclosure to School officials with legitimate educational interests. A School official typically includes a person employed by the School as an administrator, supervisor, instructor, or support staff member (including health or medical staff and law enforcement unit personnel) or a person serving on the School board. A School official also may include a volunteer, contractor, or consultant who, while not employed by the School, performs an institutional service or function for which the School would otherwise use its own employees and who is under the direct control of the School with respect to the use and maintenance of PII from education records, such as an attorney, auditor, medical consultant, or therapist; a parent or student volunteering to serve on an official committee, such as a disciplinary or grievance committee; or a parent, student, or other volunteer assisting another School official in performing his or her tasks. A School official typically has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibility.

Upon request, the School discloses education records without consent to officials of another school or school district in which a student seeks or intends to enroll, or is already enrolled if the disclosure is for purposes of the student's enrollment or transfer.

4. The right to file a complaint with the U.S. Department of Education concerning alleged failures by the School to comply with the requirements of FERPA. The name and address of the office that administers FERPA are:

Student Privacy Policy Office
U.S. Department of Education
400 Maryland Avenue, SW
Washington, DC 20202

See the list below of the disclosures the School may make without consent.

1. FERPA permits the disclosure of PII from students' education records, without consent of the parent or eligible student, if the disclosure meets certain conditions found in § 99.31 of the FERPA regulations. Except for disclosures to School officials, disclosures related to some judicial orders or lawfully issued subpoenas, disclosures of directory information, and disclosures to the parent or eligible student, § 99.32 of the FERPA regulations requires the School to record the disclosure. Parents and eligible students have a right to inspect and review the record of disclosures. The School may disclose PII from the education records of a student without obtaining prior written consent of the parents or the eligible student.
2. To other School officials, including teachers, within the educational agency or institution whom the School has determined to have legitimate educational interests. This includes contractors, consultants, volunteers, or other parties to whom the school has outsourced institutional services or functions, provided that the conditions listed in § 99.31(a)(1)(i)(B)(1) - (a)(1)(i)(B)(3) are met. (§ 99.31(a)(1))
3. To officials of another school, school system, or institution of postsecondary education where the student seeks or intends to enroll, or where the student is already enrolled if the disclosure is for purposes related to the student's enrollment or transfer, subject to the requirements of § 99.34. (§ 99.31(a)(2))
4. To authorized representatives of the U. S. Comptroller General, the U. S. Attorney General, the U.S. Secretary of Education, or State and local educational authorities, such as the State educational agency (SEA) in the parent or eligible student's State. Disclosures under this provision may be made, subject to the requirements of § 99.35, in connection with an audit or evaluation of Federal- or State-supported education programs, or for the enforcement of or compliance with Federal legal requirements that relate to those programs. These entities may make further disclosures of PII to outside entities that are designated by them as their authorized representatives to conduct any audit, evaluation, or enforcement or compliance activity on their behalf, if applicable requirements are met. (§§ 99.31(a)(3) and 99.35)
5. In connection with financial aid for which the student has applied or which the student has received, if the information is necessary for such purposes as to determine

eligibility for the aid, determine the amount of the aid, determine the conditions of the aid, or enforce the terms and conditions of the aid. (§ 99.31(a)(4))

6. To State and local officials or authorities to whom information is specifically allowed to be reported or disclosed by a State statute that concerns the juvenile justice system and the system's ability to effectively serve, prior to adjudication, the student whose records were released, subject to § 99.38. (§ 99.31(a)(5))
7. To organizations conducting studies for, or on behalf of, the school, in order to: (a) develop, validate, or administer predictive tests; (b) administer student aid programs; or (c) improve instruction, if applicable requirements are met. (§ 99.31(a)(6))
8. To accrediting organizations to carry out their accrediting functions. (§ 99.31(a)(7))
9. To parents of an eligible student if the student is a dependent for IRS tax purposes. (§ 99.31(a)(8))
10. To comply with a judicial order or lawfully issued subpoena if applicable requirements are met. (§ 99.31(a)(9))
11. To appropriate officials in connection with a health or safety emergency, subject to § 99.36. (§ 99.31(a)(10))
12. Information the School has designated as "directory information" if applicable requirements under § 99.37 are met. (§ 99.31(a)(11))
13. To an agency caseworker or other representative of a State or local child welfare agency or tribal organization who is authorized to access a student's case plan when such agency or organization is legally responsible, in accordance with State or tribal law, for the care and protection of the student in foster care placement. (20 U.S.C. § 1232g(b)(1)(L))
14. To the Secretary of Agriculture or authorized representatives of the Food and Nutrition Service for purposes of conducting program monitoring, evaluations, and performance measurements of programs authorized under the Richard B. Russell National School Lunch Act or the Child Nutrition Act of 1966, under certain conditions. (20 U.S.C. § 1232g(b)(1)(K))

Military Recruiter Access to Secondary Students

Military recruiters or institutions of higher learning shall have access to secondary school students' names, addresses, and telephone listings unless the parent/guardian of such student submits a written request that such information not be released without their prior written consent.

FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT (FERPA) ANNUAL NOTICE FOR DIRECTORY INFORMATION

The Family Educational Rights and Privacy Act (FERPA) requires Heartwood Montessori, with certain exceptions, to obtain your written consent prior to the disclosure of personally identifiable information from your child's education records. However, Heartwood Montessori may disclose appropriately designated "directory information" without written consent, unless you have advised Heartwood Montessori to the contrary in accordance with Heartwood Montessori's procedures. The primary purpose of directory information is to allow Heartwood Montessori to include information from your child's education records in certain school publications. Examples include:

- A playbill, showing your student's role in a drama production;
- The annual yearbook;
- Honor roll or other recognition lists;
- Graduation programs; and
- Sports activity sheets, such as for wrestling, showing weight and height of team members.

Directory information, which is information that is generally not considered harmful or an invasion of privacy if released, can also be disclosed to outside organizations without a parent's prior written consent. Outside organizations include, but are not limited to, companies that manufacture class rings or publish yearbooks. In addition, Heartwood Montessori is required to provide military recruiters, upon request, with a student's name, address, and telephone listing, unless parents have advised Heartwood Montessori that they do not want their student's information disclosed without their prior written consent.

If you do not want Heartwood Montessori to disclose any or all of the types of information designated below as directory information from your child's education records without your prior written consent, you must notify Heartwood Montessori in writing within the first three weeks of the school year (or within the first three weeks of enrollment for students that enroll after the first three weeks of the school year). Heartwood Montessori has designated the following information as directory information:

- Student's name
- Address
- Telephone listing
- Electronic mail address
- Photograph
- Date and place of birth

- Major field of study
- Dates of attendance
- Grade level
- 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
- Student ID number, user ID, or other unique personal identifier used to communicate in electronic systems but only if the identifier cannot be used to gain access to education records except when used in conjunction with one or more factors that authenticate the user's identity, such as a PIN, password, or other factor known or possessed only by the authorized user
- A student ID number or other unique personal identifier that is displayed on a student ID badge, but only if the identifier cannot be used to gain access to education records except when used in conjunction with one or more factors that authenticate the user's identity, such as a PIN, password, or other factor known or possessed only by the authorized user.

PARENTAL ACCESS TO STUDENT RECORDS

Parents and guardians shall have access to all written and electronic records of Heartwood Montessori or a Heartwood Montessori employee concerning the parent's or guardian's child and to all electronic accounts of the parent's or guardian's child, including all of the following:

1. Attendance records.
2. Test scores of school-administered tests and statewide assessments.
3. Grades.
4. Extracurricular activities or club participation.
5. Disciplinary records.
6. Counseling records.
7. Psychological records.
8. Applications for admission.
9. Health and immunization information, including any medical records that are maintained by a health clinic or medical facility operated or controlled by Heartwood Montessori or that are located on its property.
10. Teacher and counselor evaluations.
11. Reports of behavioral patterns.
12. Email accounts.
13. Online or virtual accounts or data.

These records must be given to parents or guardians within ten (10) days of receipt by Heartwood Montessori of a written request.