



LAW OFFICES OF MIDDLETON, YOUNG & MINNEY, LLP

MARCH 25, 2009

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State Board of Education
California Department of Education
Charter Schools Division
1430 N Street
Sacramento, CA 95814

VIA: HAND DELIVERY

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ANDREW G. MINNEY

***Re: River Montessori Charter School Charter Petition
Appeal to the State Board of Education***

Dear Members of the State Board of Education:

Our office serves as general legal counsel to River Montessori Charter School (the "Charter School"). This letter is to inform you that the Charter School intends to appeal the denial of its charter petition by the Old Adobe Union School District (the "District") and the denial of its charter petition by the Sonoma County Board of Education (the "County") to the State Board of Education ("SBE"), as provided for in Education Code Section 47605(j)(1) and Title 5, California Code of Regulations Section 11967(b). Title 5, California Code of Regulations Section 11967(b) requires that a charter school whose petition has been denied and that wishes to appeal its petition to the SBE must send the following information within 180 days after the denial action:

- (1) A complete copy of the charter petition as denied by the District, including the signatures required by Education Code Section 47605. (Attached under Binder Tab 1.)
- (2) Evidence of the District governing board's action to deny the petition (e.g. meeting minutes) and the governing board's written factual findings specific to the particular petition, when available, setting forth specific facts to support one or more of the grounds for denial set forth in Education Code Section 47605(b). (Minutes from the District's October 13, 2008 meeting, attesting to its action to deny the charter, are attached under Binder Tab 2. The District's resolution to deny the petition is also attached under Binder Tab 2.)
- (3) Evidence of the County governing board's action to deny the petition (e.g. meeting minutes) and the governing board's written factual findings specific to the particular petition, when available, setting forth specific facts to support one or more of the grounds for denial set forth in Education Code section 47605(b).

OF COUNSEL
SUZANNE A. TOLLEFSON

(The County's review matrix of the charter petition, and resolution to deny the petition are attached under Binder Tab 3. Also attached under Binder Tab please find numerous documents submitted to the County in support of the petition.)

- (4) A signed certification stating that petitioners will comply with all applicable law. (Attached under Binder Tab 4.)
- (5) A description of any changes to the petition necessary to reflect the State Board of Education as the chartering entity as applicable. (A detailed list of changes to reflect the SBE as the Charter School's authorizer is attached under Binder Tab 5).
- (6) A compact disc with all the above listed materials in electronic format is also included.

We have prepared a detailed Table of Contents for all documents contained in the two binders that comprise the Charter School's appeal submission.

At its February 5, 2009 meeting, the County voted to deny the Charter School's petition. This appeal is therefore well within the 180 day limit for submission of an appeal of a charter petition.

According to Title 5, California Code of Regulations Section 11967(3), no later than 90 days after receiving a complete petition package, the State Board of Education shall schedule, at its next regular board meeting, an action item to grant or deny the charter petition. We anticipate that the SBE will adhere to this timeline during its consideration of the charter petition.

We look forward to working with the State Board of Education as it considers the charter petition. Please feel free to contact me if you have any questions.

Sincerely,

LAW OFFICES OF MIDDLETON,
YOUNG & MINNEY, LLP



LISA A. CORR
ATTORNEY AT LAW

cc: River Montessori Charter School



***River Montessori Charter School
16 Elements of a Charter Petition Guide***

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| 1) | Mission and Educational Program | begins on page 2 |
| 2) | Outcomes/Standards | page 25 |
| 3) | Assessment Methods | page 25 |
| 4) | Governance – Fiscal | page 35 |
| 5) | Staffing | page 39 |
| 6) | Health and Safety | page 43 |
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| 10) | Student Suspension and Expulsion Policy | page 52 and Appendix L |
| 11) | Retirement Systems | page 42 |
| 12) | Student Attendance Alternatives | page 52 |
| 13) | Staff Return Rights | page 42 |
| 14) | Dispute Resolution process | page 47 |
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| 16) | School Closure procedures | page 57 |

RMCS Volunteer Commitments 2009-2010

Name: Eden Belov
Volunteer Task: Graphic Design For marketing purposes for River and as needed
Garden Assistant, Art room assistant
Qualifications: BFA, 10+ years experience as a designer and art director
Passion for gardening with 4 semesters of environmental
landscaping classes at College of Marin
Commits to: 10 hours/month

Name: Kenny Belov
Volunteer Task(s): Food awareness educator
Qualifications: Partner and GM of Fish. in Sausalito, CA - a restaurant whose focus is serving
sustainably caught/farmed fish and local, seasonal organic produce.
Commits to: 3 hours/month

Name: John Campbell
Volunteer Task: music enrichment
Qualifications: musician
Commits to: 1 hour/week

Name: Sue Davy
Volunteer Task: Information storage and retrieval, math enrichment, literature enrichment Parent
Organization leader, fiber arts: Knit, Crochet, Weave, routine office tasks, classroom
prep, drama enrichment
Qualifications: Masters in Library and Information Science, 10 years working in software
development/helpdesk/QA, Partner in Math Passion – a math enrichment
company, trained in Junior Great Books method, started and managed the garden
program at an elementary school, 10 years managing employees in software
development/helpdesk/QA.
Commits to: 15 hours/week

Name: Ken English, Esq
Volunteer Task: legal support
Qualifications: practicing attorney, JD George Washington University Law School
Commits to: 2 hours/month

Name: Ramona English, DDS
Volunteer Task: dental health education, office work, classroom assistant, fiber arts: knit, sew,
crochet, community projects, efficiency improvement project, playground help
Qualifications: Dentist and Dental Director for Petaluma Health Center, treasurer of Red Barn
Montessori

Name: Jodi Frost
Volunteer Task: grant writing, grant research
Qualifications: Masters in English
Commits to: 7 hours/month

Name: Helen Grieco
Volunteer Task: Assist Board with marketing, Assist parents and students with Self Defense
information and classes. Help wherever needed.
Qualifications: Former Executive Director, marketing and media consultant, executive producer for
educational and training films
Commits to: 3 hours/month

Name: Eileen Griffith
Volunteer Task: Office assistance, volunteer coordination
Qualifications: 30 years experience in office environment, last 18 years as Operations Manager
Commits to: 2 hours/week

Name: Kelly Griffith Mannion
Volunteer Task: Tutoring of low achieving students, staff development, school evaluation, substitute teaching, parent education, assisting teachers in class
Qualifications: Masters in Education, Certified in Montessori, Experienced teacher trainer and Montessori advisor
Commits to: 3 hours/ week

Name: Malin Guerrero
Volunteer Task: Support teachers with special projects, work in the garden, help set up classroom during the summer
Qualifications: B.A. in History, Montessori credential 3-6 years, co-director of a Montessori Preschool
Commits to: 2 hours/week

Name: Leslie Harrison
Volunteer Task: Library maintenance, Read aloud and remedial reading tutoring
Qualifications: Masters in Library and Informational Science
Commits to: 10 hours /week

Name: Christina Isetta
Volunteer Task: Office Assistance, nutrition education, sign-language enrichment class
Qualifications: Graduate UC Davis, Major Psychology, minor Education.
College internship-California Department of Education, Child Nutrition Division
Taught Sign Language to pre-school children 1994-1995
General Manager Commercial Landscape
Commits to: 10 hours/week

Name: Beth Laurence, JD
Volunteer Task: legal work, grant writing, editing
Qualifications: JD University of California, 10 years grant writing and editing
Commits to: 6 hours/month

Name: Betty Li
Volunteer Task: Site Planning, Architectural Work, Playground Design, Playground Volunteer, Classroom Volunteer
Qualifications: BA in Architecture, Currently on the board for Red Barn Montessori
Commits to: 6 hours/month

Name: Cindy Lohrentz
Volunteer Task: Illness prevention education for staff and student body, Office assistant, Garden program with students, garden maintenance,
Qualifications: Masters in Nursing, avid gardener, able to do office work
Commits to: 10 hours/week

Name: Tim Lohrentz
Volunteer Task: Board training, strategic planning for the River Board, evaluation of school including analysis teacher/parent and student surveys, analysis of test score data, incorporation of findings from the analysis into school strategic planning.
Qualifications: Experienced researcher, Masters in Urban Planning, Program Manager at Insight Center for Community Economic Development, research consultant for Strategic Learning Initiatives.
Commits to: 10 hours/month

Name: Melodese Mahoney
Volunteer Task: Nutrition education of staff, parents and children, Healthy lifestyles
Qualifications: Registered dietitian at Kaiser, Santa Rosa
Commits to: 2 hours/week

Name: Jaana Nieuwboer
Volunteer task: Fund-raising, promotions, event planning, Front-office assistance, bookkeeping, secretarial duties
Qualifications: BS – Marketing and Economics, 20+ years subscription/membership marketing
Commits to: 5-10 hours / week

Name: Danielle Oryn, DO
Volunteer Task: Web design and maintenance
Qualifications: Familiar with most aspects of web design
Commits to: 3 hours/ month

Name: Jennifer Oryn
Volunteer Task: Office assistance
Qualifications: Masters in Human Developemnt, started and owns her own business
Commits to: 5 hours/week

Name: Sara Peracca
Volunteer Task: Any qualitative or quantitative research needed, assist with inclusion of Environmental Science in curriculum, tutoring in Science and Math
Qualifications: Doctorate in Sociology specializing in Demography, Masters in Environmental Science, Masters in Public Health
Commits to: 5 hours/ week

Name: Patrick Phair
Volunteer task: Alexander Techniques, educating children on healthy body movement and self defense
Qualifications: Certified Self Defense Instructor, Founder of Defending Ourselves
Commits to: 3 hours/month

Name: Andrea Rattenbury
Volunteer Task: low achieving student tutoring
Qualifications: California State credentialed public school teacher, CLAD credentialed
Commits to: 2 hours/month

Name: Mary Jane Salberg
Volunteer Task: Classroom assistant, Spanish translation, support to English language learners
Qualifications: Mom, fluent in Spanish, studied teaching English as a Second Language
Commits to: 3 hours/week

Name: Dana Wade
Volunteer Task: Recruiting of staff, staffing, remedial/special education/tutoring
Qualifications: Nearly completed (have completed all coursework) Masters in Education with emphasis in special ed.
Commits to: 10 hours/week

September 19, 2008

Diane Zimmerman, Ph.D. Superintendent

Members of the Board of Education

Old Adobe Union School District
845 Crinella Drive, Petaluma, CA 94954

Dear Dr. Zimmerman and Members of the Board of Education,

The purpose of this letter is to follow up in writing to the responses we, the Petitioners for the River Montessori Charter School (“Charter School”), provided verbally at the public hearing held on September 10, 2008. This letter repeats the question/comment raised along with the name of the person we believe raised the question/comment in parenthesis and our response follows in italicized text below. Please forgive any paraphrasing of the questions or comments as they have been recreated from our rough notes.

- 1) Assessment is important to this District and thus, I would want to know more about assessment at the Charter School. (CTA representative)

Assessment is an important and valuable tenet of the Montessori educational model. A multi-pronged approach of self-assessment, teacher observation and analysis, and study and curriculum requirements allows for complete assurance that the student is progressing successfully.

Students are required to determine, evaluate, and re-set appropriate goals for themselves in all areas of development. Students record and analyze their work in their Weekly Work Plan (WWP) and discuss it individually with their teacher. This self-reflection with the support of the teacher provides a rich dynamic of growth academically as well as in other areas of development.

Montessori teachers are trained to observe and record the work and actions of each student so as to determine the next lesson or step in all areas of achievement. This ranges from progressive lessons in mathematics and science to interpersonal skills and service learning. Teachers are constantly making formal observations and assessments of the classroom as a group, small groups, as well as at the individual level. As a general practice, you’ll find teachers observing small groups and the group as a whole on a minute-to-minute basis and individual students no less than twice daily. Observation records are maintained for each student.

The curriculum in Montessori is unique in that it is concrete and progressive. Students cannot and do not progress to the next lesson until they have mastered the preceding lesson. In this way, prerequisites are met and their success is guaranteed. It also serves as a gauge and diagnostic for both student and teacher when challenges

arise. Individual, tailored support can then be administered to address the specific learning needs of the student.

The above description of how the Montessori method monitors the individual and class progress would be in addition to the California State mandated tests. All River students would be required to take all of the California State mandated tests like any other public school student.

2) It is important that employees at the Charter School enjoy the same protections as our unit members. (CTA/CSEA representative)

In accordance with Education Code Section 47611.5, the Educational Employment Relations Act applies to charter schools. As such, the employees have full rights to collectively bargain and to appoint an exclusive representative for such purposes. The Charter School may not and will not stand in the way of its employees' rights in this regard and will welcome both CTA and CSEA to meet with its employees.

- 3) What is the current plan for facilities?
- a. Where does the School plan to locate?
 - b. Will the School seek a facility from the District under Proposition 39?
 - c. What if it doesn't qualify? (Marlene Abel)

Our goal has always been to find a location that will house the new River Montessori Charter School within the boundaries of the District that charters us. When we created the charter, we enlisted several parents to join the site search committee. We have worked closely with real estate agent, Mike Derby. Mr. Derby is with Westgate Realty located in Petaluma. Mr. Derby has been a Petaluma resident for more than 35 years and a full-time real estate professional for 20 years. His expertise in the real estate market has provided us with numerous potential school sites.

At present, we have narrowed our list of potential sites to three locations within the Old Adobe Union School District. Each location has property owners that are willing to rent their sites to a charter school. Each also offers the potential to expand as the school grows.

In addition, members of the site committee have had the opportunity to visit Harvest Christian School, a private elementary school that recently moved their site to a location within the Old Adobe District. We have seen their work transforming a commercial space into a beautiful school. We anticipate being able to do the same with any of the three sites we choose.

At this time, River Montessori has no intention of seeking a facility under proposition 39. We fully intend to secure a site that will serve us for the first three to five years of the school's operation. As you can see from our sound budget, we have money for all costs related to securing and maintaining our own facility.

4) What are your alternative approaches for low achievers? (Debbie Sammon)

Alternative approaches for “low achievers” include meeting the student developmentally, designing and implementing an individualized plan for success, and constant support from teachers, families, and specialists.

All students in a Montessori classroom are at differing levels in all areas of their development. A multiage and diverse program allows each child to be met where they are in their own personal developmental path regardless of whether they are ahead of or behind the curve. Montessori philosophy and practice allows the student to enjoy a practical and motivating impetus for growth as well as the knowledge that everyone learns differently and at a different rate. The concrete nature of the materials and following a careful and sequential path to abstraction have demonstrated themselves to be invaluable to the struggling student.

As the materials are progressive and serve as a gauge, each student is afforded a unique learning plan in that they start wherever they are and progress from that point. Each classroom houses the advanced materials from the preceding level and the beginning materials from the subsequent level. For example, a lower elementary classroom would have advanced materials from the early childhood/kindergarten level as well as initial lessons from the upper elementary classroom. Additional curriculum and materials are brought in to support the children as necessary. In this way, children are likely to find their match academically. For children who are struggling, placement is typically determined by social development. Cognitive needs are met by appropriating the correct materials for that particular child’s academic strengths and weaknesses.

All students’ needs are addressed on an individual and case-by-case basis-- all students, regardless of placement, maintain their own Individual Lesson Plans (ILPs) and WWPs. The review process inherent in the ILP and the WWP ensures the child’s individual progress. Should a student benefit from an IEP, a District procedure would be followed to serve the child.

Our community has also provided support for students by offering their own expertise (Please see RMCS Volunteer Commitments 2009-2010 included in the RMCS Charter Binder.) Our community includes resource teachers and professionals ready to provide services in many academic and developmental areas. Volunteers will be utilized when qualified and available.

5) Why Old Adobe School District? (Mary Colbert)

We chose Old Adobe School District for a variety of reasons. First and Foremost, we felt that the commitment that the Old Adobe School Board and that of Dr. Zimmerman have to quality education for their children is refreshing and needed in today’s world of evaluating achievement based on simple metrics. We feel that the

District's desire to ensure that the children of the district are obtaining the best education possible creates an environment in which we would be appreciated and would have a mutually beneficial interaction. In addition, Dr. Zimmerman's willingness to seek out new teaching approaches such as the dual immersion program and an earlier attempt to bring Montessori to Bernard Eldridge confirms our belief that this District is not only open to innovation but is by definition innovative. Lastly, many members from our community, not only current petitioners, encouraged us to apply within their district, including two of our board members.

6) What type of non-certificated staff do you anticipate employing? (Debra Sammon)

As a small charter school, the number of non-certificated staff will be limited. During our first two years of operations, we will have an Office Manager who will perform various functions including ADA tracking and student records. During our third year, we will add a second non-certificated office staff, who will take on some roles from the Office Manager, including reception and some of the record keeping. Other functions will be taken care of on a contracted basis, including janitorial services, payroll, and accounting services. In addition, parents will be volunteering in the office and grounds, as appropriate.

7) Our primary concern is the education of the children within our District. With that in mind, we need to know not only about assessment but also about the fiscal viability of the school. (Rick Parker)

Please see the response regarding assessment above under #1. As to fiscal viability, please consider the following:

- *We used very conservative assumptions to prepare our budget. For example, we assume a 95 percent average daily attendance (ADA), whereas most charter schools are at 97 or 98 percent ADA.*
- *We assume a modest 2 percent annual cost-of-living-adjustment (COLA) to state block grants. Yet for most of the past eight years, the COLA adjustment to charter school grants has been greater than 2 percent.*
- *We assume that we will receive only \$350,000 of the federal charter school planning and implementation grant, which is allocated during the start-up year as well as the first two operational years. Yet, we are eligible and likely will receive the full \$600,000. It should be noted that this grant was not competitive last year and likely will not be competitive this year since a lot of the 2007-08 federal grant funds were rolled over to 2008-09. Therefore, we will likely have an additional \$250,000, which is not present in our budget, as is. The last page of the budget appendix demonstrates how we would spend the federal grant, whether it is \$350,000, \$600,000, or some amount in between.*
- *Aside from the initial money, which we are raising now, our budget does not assume any fundraising revenue. Yet, most charter schools are able to raise between \$40,000 and \$100,000 per year, depending on their size.*

- *The budget also assumes no revenue from before and after care, yet we expect to generate revenue from this fee-for-service activity. Before and after care would be organized and provided by the River Montessori Foundation, with revenue provided to the school in the form of a donation.*

8) Is a charter school subject to the same reserve requirement of a school district?
(Russ Wigglesworth)

As your Director of Business Services indicated, a charter school is not subject to the same reserve requirement, but our reserve of \$53,000 sufficiently meets that requirement for a school district of similar size.

9) One percent for oversight fees on a budget of your size is not very much. (Diane Zimmerman)

The 1% oversight fee to the District assumes a minimal amount of oversight, as required by law. If the District prefers to further reduce its oversight role by having the charter school state funds allocated directly from the county (SCOE) to the charter school, we are open to that arrangement. On the other hand, if the District were to provide additional oversight and administrative services to the charter school, above that required by the law, we would expect that to be a fee-for-service arrangement. For example, the contracted accounting and payroll services expenditure and the janitorial services expenditure are each between 1% and 2% of our total budget.

We look forward to a follow-up meeting where we can discuss which services, if any, the District might wish to provide and at what cost these services would be provided. This discussion will enable the District to assess more accurately the fiscal benefit the Charter School may provide to the District.

10) California does not fund public schools enough. We need to make sure that the Charter School can weather a storm because the District cannot be at financial risk due to the Charter School (Marlene Abel)

Please see our response to question #7 for a detailed description of our fiscal viability. Assuming that the District has demonstrated its fiscal oversight responsibilities, it would not have financial risk or be liable for any charter school debt. Any financial obligations of the charter school, in the event of closure of the

school, would be handled according to California nonprofit law and according to the school's closure policy, fully described in our charter petition.

We look forward to a follow-up discussion where we can review our budget and assumptions with your Director of Business Services to ensure viability under the most conservative of circumstances.

11) How are statewide standards addressed by public Montessori programs? (Russ Wigglesworth)

Please see Appendix G of the charter where we have provided a correlation of our program with the California State Standards.

12) Are Charter Schools required to administer all State standardized tests? (Russ Wigglesworth)

Yes.

13) How do you prepare students for standardized testing in a Montessori environment? (Russ Wigglesworth)

Some form of standardized testing is not an uncommon practice in Montessori classrooms. For the Montessori student who is given neither a constant barrage of tests nor preparation for such, test-taking is simply another practical life-skill which children need to learn. Responsibilities are an important part of the Montessori classroom experience and testing is one task in which the students assume ownership and rise to the occasion in a Montessori public environment.

Students in public Montessori programs typically are given lessons in how to take a test and then supported in understanding that it is simply one measurement, among many, of progress. Having a solid understanding of purpose and practice, and the freedom from specific outcomes alleviates the pressure on the student and, given the fact that Montessori students tend to test very well, have proven to be a successful model for implementing standardized tests in a Montessori classroom.

14) What is "Albanesi"? (Diane Zimmerman)

The Albanesi Educational Center creates Montessori curriculum materials and is a Montessori teacher-training center. To meet the growing demand of public as well as private Montessori schools addressing and delivering standardized tests, specific curriculum materials have been created to integrate Montessori curriculum with traditional curriculum. These curriculum programs include a sequential, individualized learning plan utilizing curriculum cards for presentations and exercises, and review and assessment tests which measure academic progress. Albanesi materials address mathematics and geometry, language, including grammar and writing, science, history, and geography. Albanesi materials are being used in over 5,000 Montessori schools and have been proven successful in public Montessori.

15) Where will your target students be coming from? (Rick Parker)

Of current petitioners, 20 are from Old Adobe District, 33 are from Petaluma City School District and another 15 are from other districts within Sonoma and Marin Counties. We expect that the Montessori preschools in the area (at present there are 11 of them) will be natural feeders to our school. We will also conduct outreach in Spanish and English using a variety of different methods to ensure that students within the district, and elsewhere in the larger community are aware of River Montessori Charter School.

16) What is your ultimate goal five years from now? (Rick Parker)

- *Continued fiscal solvency*
- *Accomplishing the goals set forth in our mission and achieving academic outcomes stated in the Charter*
- *Honoring all of our agreements with the District*
- *Maintaining a healthy, mutually beneficial relationship with the District*

17) How big was Eagle Peak Montessori when it began? (Rick Parker)

Eagle Peak had 60 students during the first year of operation. We have decided to start with 100 students our first year in order to attain a higher degree of fiscal sustainability. Charter schools with at least 100 students in their first year are eligible for a \$600,000 federal planning and implementation grant instead of the \$250,000 grant available to schools with 60 to 99 students.

18) What is the value added for the District students? (Mary Colbert)

First, approximately 20 of our current petitioners reside within your District, and our Charter School would provide them with their preferred mode of learning as a public school choice within the District. Second, we understand that Sonoma County is generally in declining enrollment. Competition for students is high, and many school districts within the county have created charter schools to compete without the constraint of inter-district transfers. There are only 14 public Montessori programs within the state and none of them are in Sonoma County. An option like this will further cause the District to stand out in the County as cutting edge and innovative. Parents who come to the Montessori School will likely not only see the charter but also the other innovative options offered by the District. They may choose one of the other District options for a sibling or recommend it to a friend. Another benefit of chartering is the research and development it affords. Benefits seen from another teaching method may be tried at other schools in the district. Further, we hope that a fee for service relationship might result in a financial benefit to the District. Finally, Montessori encourages a dedicated parent volunteer population. Volunteering will extend beyond the Charter School to include service to the District. We will

encourage our parents to be active volunteers to the District, because the District's success will support our healthy relationship.

Sincerely,

River Montessori Founding Board Members

**RESOLUTION #480 OF THE GOVERNING BOARD
OF THE OLD ADOBE UNION SCHOOL DISTRICT
DENYING PETITION TO FORM THE RIVER MONTESSORI CHARTER SCHOOL
AND WRITTEN FINDINGS IN SUPPORT THEREOF**

WHEREAS, by enacting the Charter Schools Act (Ed. Code §§ 47600, *et seq.*), the Legislature has declared its intent to provide opportunities to teachers, parents, pupils, and community members to establish and maintain schools that operate independently from the existing school district structure for the purposes specified therein; and

WHEREAS, the Legislature has declared its intent that charter schools are and should become an integral part of the California educational system and the establishment of charter schools should be encouraged, and that charter schools are part of and under the jurisdiction of the Public School System and the exclusive control of the officers of the public schools; and

WHEREAS, although charter schools are exempt from many of the laws governing school districts, in return for that flexibility they are accountable for complying with the terms of their charters and applicable law; and

WHEREAS, Education Code section 47605(b) charges school district governing boards with the responsibility of reviewing charter petitions to determine whether they meet the legal requirements for a successful charter petition; and

WHEREAS, a successful charter petition must contain reasonably comprehensive descriptions of the criteria set forth in Education Code section 47605(b)(5)(A)-(Q), as well as the affirmations and other requirements set forth in Education Code section 47605; and

WHEREAS, a governing board may deny a petition to form a charter school if it makes written findings to support any of the following under Education Code section 47605(b): “(1) The charter school presents an unsound educational program for the pupils to be enrolled in the charter school; (2) The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition; (3) The petition does not contain the number of signatures required by [the statute]; (4) The petition does not contain an affirmation of each of the conditions described in subdivision (d); and (5) The petition does not contain reasonably comprehensive descriptions of all of the [criteria set forth in Education Code section 47605(b)(5)(A)-(Q).]”; and

WHEREAS, on or about August 15, 2008 the Old Adobe Union School District received a petition to form the River Montessori Charter School, a public charter school to serve grades 1-4, with an initial enrollment of 100 students during its proposed first year of operation during the 2009-2010 school year, and a projected enrollment of 190 students in grades 1-5 by year five; and

WHEREAS, the Board of Education, under Education Code section 47605(b), is obligated to take action to grant or deny the Petition within 60 days of its submission; and

WHEREAS, the District provided a resolution outlining its findings on the Charter Petition to the Petitioners, and provided the Petitioners an opportunity to respond to those concerns in writing before the Board meeting.

NOW, THEREFORE, BE IT FURTHER RESOLVED AND ORDERED by the Governing Board of the Old Adobe Union School District that the Petition be DENIED based on the findings enumerated below:

1. The Petition fails to contain a reasonably comprehensive description of the following:

a. A sound educational program that is likely to be of educational benefit to students. (Education Code section 47605(b)(5)(A); C.C.R. section 11967.5.1(f)(1)(A)):

- i. Although parallels have been drawn with the Montessori teaching program and specific Montessori activities, it is difficult with this Petition to adequately assess the completeness of the program in relation to the California Standards. The Petition's plan for Standards aligned curriculum does not give sufficient weight to "key standards."
- ii. The Petition lacks a reasonably comprehensive plan for assessing and monitoring students in the grades first through third. In grades fourth through sixth the Petition is dependent upon the STAR, which is only one measure.
- iii. The Petition focuses on teacher observation of Montessori activities and does not include external, research based measurements which would inform intervention strategies.
- iv. The Petition does not adequately address the selection of and usage of standards aligned text books

b. A reasonably comprehensive plan to educate English Language Learner students. (5 C.C.R. section 11967.5.1(f)(1)(G)):

The petition's plan to education EL students lacks sufficient detail regarding the standards and process for EL instruction, including placement, evaluation and redesignation.

c. A reasonably comprehensive plan describing how the Charter School would identify and respond to the needs of pupils who are not achieving at or above expected levels. (Education Code section 47605(b)(5)(A); 5 C.C.R. section 11967.5.1(f)(1)(F)):

The petition's proposed plan for low-achieving students lacks sufficient detail regarding standards for identification, assessment and integration. It also fails to adequately incorporate the Montessori teaching program.

- d. A plan for special education that contains a reasonably comprehensive description of the charter school's obligations with respect to special education services, including but not limited to the charter school's child find procedure, and how the charter school would integrate its Montessori program with the provision of special education services. (Education Code section 47646(a), 5 C.C.R. section 11967.5.1(f)(1)(H)):

The Petition lacks a reasonably comprehensive plan for special education. Petitioners have not included a reasonably comprehensive description of a plan for how Charter School staff and administration will become trained in District and SELPA policies and procedures. Whether Petitioners have sufficient knowledge among charter school staff and administration for undertaking joint responsibilities in the provision of special education services is not clear. The petitioner's reference to the child find procedure is cursory and underdeveloped, and the petition contains an insufficient description of the identification and assessment procedures to be used, other than the very general statement that "[a]necdotal data supports the assertion that children who have early Montessori training are more likely to have their exceptional gifts and challenges identified and an environment for nurturing these gifts and challenges provided."

Further, the Petition fails to address the potential difficulties created by students whose disabilities require instruction other than by the Montessori method, and whose areas of unique need must be met in smaller learning environments. The Petition strongly suggests that a special education student's unique needs must meet the Charter's pedagogical approach rather than the reverse, which is mandated by federal and state special education laws.

- e. Measurable pupil outcomes and methods for measuring pupil outcomes. (Education Code section 47605(b)(5)(B) and (C), 5 C.C.R. 11967.5.1(f)(2) and (3)):

The petition fails to contain sufficiently defined measurable pupil outcomes, or alternative assessment measures beyond the traditional standardized measures.

- f. The bylaws which would govern the non-profit public benefit corporation governing the charter school. (Education Code section 47605(b)(5)(D), 5 C.C.R. 11967.5.1(f)(4)):

The bylaws contain a provision authorizing the governing board to delegate the management of the charter school to a third-party management company that is too broad and undeveloped.

The charter petition states that the charter school board will comply with conflict of interest statutes applicable to school district board members, but the board's bylaws contain provisions that are inconsistent with these statutes.

- g. Human Resources (Education Code section 47605(b)(5)(E)), 5 C.C.R. 11967.5.1(f)(5)):

The petition does not contain an adequate description of employee rights should the charter school employees exercise their right to organize and designate an exclusive representative.

- h. A student admissions policy that complies with the preference requirements of Education Code section 47605(d)(2)(B) and 47605(d)(1) (Education Code section 47605(b)(5)(H), 5 C.C.R. 11967.5.1(f)(8).)
- i. A suspension/expulsion procedure that meets due process requirements (Education Code section 47605(b)(5)(J), 5 C.C.R. 11967.5.1(f)(10).):

The proposed student discipline policy is not reasonably comprehensive in that:

- The Petition's enumerated offenses initially track those of Education Code section 48900. However item (q) omits the definition of hazing, which raises a due process concern;
 - The Petition includes in its enumerated offenses grounds (i.e., terrorist threats, sexual harassment, hate violence, hostile environment) that are terms of art and that are not sufficiently defined for elementary-aged students;
 - The discipline procedure fails to limit jurisdiction to only those acts related to school activity or school attendance occurring within a school under the jurisdiction of the superintendent or principal or occurring within any other school district. This raises a due process concern;
 - The discipline procedure fails to track Education Code section 48915's conditions under which suspensions and expulsions must, as opposed to may, be recommended, which raises concerns as to whether discipline would be commensurate with the alleged act of wrongdoing;
 - The policy does not contain a reasonably comprehensive description of procedures where discipline results in a change of placement for child with a disability;
 - The policy does not provide a reasonably comprehensive description of interim alternative educational settings for students subject to suspension/expulsion.
- j. Financial statements that include a viable proposed first-year operational budget, including startup costs, and cashflow and financial projections for the first three years of operation (Education Code section 47605(g), 5 C.C.R. 11967.5.1(b)(3).):

The budget contains an unsubstantiated projected first-year enrollment of 100 students. However, given that the petitioners have increased their enrollment

projections a number of times already in previous petitions, the latest projection is not realistic. Using the District's fiscal procedures and standards, staff assumed that the charter school's enrollment to be 72 students in year one, increasing by 20 students in the subsequent two years. Even adjusting the charter school's expenses based on this revised assumption, the District projects that the charter school would incur a deficit in net revenue of \$34,962 in year one, \$118,220 in year two, and \$138,720 in year three. The District was generous in its budgetary assumptions in that it utilized the petitioners' full assumptions regarding the receipt of State and Federal grants, even though the petitioners did not provide the requisite documentation verifying that such funds had been committed. The petitioners' budget did not include any alternative or contingency plans if these sources of funding did not materialize, and also underestimates the charter school's special education encroachment.

- k. Identification of a facility, or a legally timely request for a facility to the District under Education Code section 47614, or proper identification of all of the legal requirements necessary for use and occupation of the facility, or allocation of resources to secure a facility (Education Code section 47605(g); 5 C.C.R. 11967.5.1(c)(3)(D)):

The charter fails to identify a facility for the charter school, or a strategic plan for identifying and securing the facility. The petition signatures reflect that most of the charter school's projected student population would come from outside of the District, which would prevent the charter school from qualifying for a facility under Proposition 39.

2. The Board also finds that the Petitioners are demonstrably unlikely to successfully implement the program set forth in the Petition due to "unfamiliarity with the requirements of law that would apply to the proposed charter school," for the reasons set forth above. (Education Code section 47605(b)(2); 5 C.C.R. 11967.5.1(c)(2)).

The Board hereby finds that, under Education Code section 47605(b):

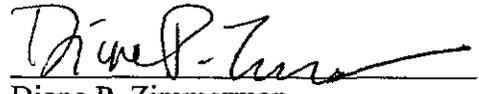
- a. The Charter School presents an unsound educational program for the pupils to be enrolled in the Charter School;
- b. The Petitioners are demonstrably unlikely to successfully implement the program set forth in the Petition;
- c. The Petition does not contain reasonably comprehensive descriptions of all of the [criteria set forth in Education Code section 47605(b)(5)(A)-(Q).]

The Board is therefore compelled to deny the Petition under the provisions of the Charter Schools Act. The Petition is hereby denied.

PASSED AND ADOPTED on October 13, 2008, by the Governing Board of the Old Adobe Union School District by the following vote:

AYES: 5
NOES: 0
ABSTENTIONS: 0
ABSENCES: 0

I declare under penalty of perjury that the foregoing resolution was duly passed and adopted on the date and by the vote stated.

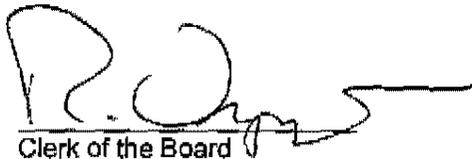


Diane P. Zimmerman
Diane P. Zimmerman
Secretary of the Governing Board for
THE OLD ADOBE UNION SCHOOL
DISTRICT

Minutes
Old Adobe Union School District
Special Board Meeting
La Tercera School
1600 Albin Way
October 13, 2008
7:00 p.m. Open Session
Reviewed by the Clerk: 10/17/2008

ITEM #	NOTES	HEADING
	<p>The meeting of the Old Adobe Union School District was called to order by President Colbert at 7:00 p.m.</p> <p>PRESENT: Mary Colbert, President; Debra Sammon, Vice President; Russ Wigglesworth, Clerk; Marlene Abel, Member; Rick Parker, Member</p> <p>Guest in Attendance: John Yeh, Legal Counsel</p> <p>ABSENT:</p>	CALL TO ORDER
A	President Colbert welcomed members of the River Montessori Charter School.	OPENING
A1	There was Board consensus to adopt the agenda as presented.	ADOPTION OF AGENDA
A2	There were no comments.	PUBLIC COMMENT
A3	Trustee Parker led the group in <i>The Pledge of Allegiance to the Flag of the United States of America</i> .	PATRIOTIC OBSERVANCE
B		ACTION ITEMS
B1	<p>Dr. Zimmerman acknowledged the dedication of the parents and their educational concerns to meet the needs of their children. She expressed that it was a difficult decision for all involved and she cited the legal reasons for denial of the petition. It was her recommendation that the Board approve the resolution to deny the petition received from the River Montessori Charter School.</p> <p>Several trustees also thanked the River Montessori Charter School parents for their collaboration and professionalism throughout this process. They too felt that it was indeed a difficult choice to make.</p> <p>Parents of the River Montessori Charter School community addressed the Board and expressed their disappointment in the decision to deny the charter. They acknowledged the District for not attacking the Montessori style of education and asked for a conditional approval tonight with the opportunity to enter into a Memorandum of Understanding with the District to address the particular areas of concern.</p> <p>Trustee Wigglesworth introduced the motion to deny the petition of River Montessori Charter School and the motion was seconded by Trustee Sammon. There was consensus from the Board for approval of the resolution.</p>	RESOLUTION #480 - DENIAL OF PETITION TO FORM RIVER MONTESSORI CHARTER SCHOOL
C		CLOSING

ITEM #	NOTES	HEADING
C1	There were no comments.	PUBLIC COMMENT
C2	No information was presented.	INFORMATION
C3	Trustee Parker inquired about the CSBA conference in San Diego later this year. This item will be added to the agenda for the October 30 meeting for discussion and action. Trustee Colbert acknowledged that it was a very uncomfortable evening. She added that she will not be in attendance at the October 16 meeting because of a prior family commitment.	BOARD REPORTS
C4	Patriotic Observance Presentations: October 16, 2008 - Students from Miwok Valley School October 30, 2008 - Trustee Abel November 13, 2008 - Trustee Sammon December 11, 2008 - Students from Sonoma Mountain School	BOARD CALENDAR
C5	October 16, 2008 - Regular Board Meeting & Community Forum at Miwok Valley October 30, 2008 - Regular Board Meeting November 10, 2008 - No School, Teacher In-Service Day November 11, 2008 - No School, Veterans' Day November 13, 2008 - Regular Board Meeting November 26 through 28, 2008 - No School, Thanksgiving Break December 11, 2008 - Regular & Organizational Board Meetings and Sonoma Mountain Community Forum December 22 through January 5, 2009 - No School, Winter Break	UPCOMING DATES
	President Colbert, with consensus from the Board, adjourned the meeting at 7:30 p.m.	ADJOURNMENT


Clerk of the Board

DANSD to County

October 21, 2008

VIA FACSIMILE -- (707) 578-0220

Dr. Carl Wong
Superintendent
Sonoma County Office of Education
5340 Skylane Boulevard
Santa Rosa, CA 95403-8246

Re: Old Adobe Union School District
River Montessori Charter School Petition
Our File No. 5430.1108

Dear Dr. Wong

This law firm represents the Old Adobe Union School District. We write to address the petition to form the River Montessori Charter School.

The petitioners submitted the petition to form the charter school to the District on or about August 14, 2008. The District, pursuant to Education Code section 47605(b), held a public hearing on the petition on or about September 16, 2008. At its October 13, 2008, meeting the District's governing board voted 5-0 to deny the petition. We have been advised that the petitioners intend to appeal the District's denial to the County Board.

The purpose of the letter is to address the grounds for the Old Adobe Board's denial of the petition, as well as the petitioners' appeal.

5 C.C.R. section 11967(b) states as follows, in pertinent part:

When filing a petition with the county board of education or State Board of Education for the establishment of a charter school, petitioner(s) shall provide the following:

- (1) A complete copy of the charter petition *as denied* including the signatures required by Education Code section 47605...
- (4) ... A description of any changes to the petition necessary to reflect the county office or the State Board of Education as the chartering entity. (Emphasis Provided).

Therefore, to the extent that the petitioners submit any revisions or amendments to the petition to the County Board, such revisions and amendments would violate section 5 C.C.R. section 11967(b), and the District urges the County Board to consider the petition as it was submitted to the Old Adobe District Governing Board, at the exclusion of any revisions or amendments to the petition except as permitted by 5 C.C.R. section 11967(b).

The District's Findings:

In compliance with Education Code section 47605, the District's governing board issued written findings supporting its denial. The Old Adobe governing board adopted a resolution in support of its findings, a copy of which is attached. Those findings are summarized below.

Educational Program:

The Old Adobe board found that the charter petition did not contain a sound educational program that is likely to be of educational benefit to students. (Education Code section 47605(b)(5)(A); C.C.R. section 11967.5.1(f)(1)(A)). The Petition's proposed educational program is based on the Montessori approach. However, the Petition does not adequately address how the Montessori program would be aligned with California State standards. The Petition's plan for Standards-aligned curriculum does not give sufficient weight to "key standards." The Petition also does not adequately address the selection of and usage of standards aligned text books. Therefore, the petition did not meet the requirements of Education Code section 47605(c)(1), which states that "[c]harter schools shall meet all statewide standards."

The Petition also fails to contain a reasonably comprehensive plan to educate English Language Learner students. (5 C.C.R. section 11967.5.1(f)(1)(G)). The petition's plan to education EL students lacks sufficient detail regarding the standards and process for EL instruction, including placement, evaluation and redesignation.

The Petition lacks a reasonably comprehensive plan describing how the Charter School would identify and respond to the needs of pupils who are not achieving at or above expected levels. (Education Code section 47605(b)(5)(A); 5 C.C.R. section 11967.5.1(f)(1)(F)). The petition's proposed plan for low-achieving students lacks sufficient detail regarding standards for identification, assessment and integration into mainstream classroom teaching. It also fails to adequately incorporate the Montessori teaching program in that it does not contain a reasonably comprehensive description of an alternative educational plan in the event that students do not achieve satisfactory progress towards grade level proficiency under the Montessori method.

The Petition's plan for special education fails to contain a reasonably comprehensive description of the charter school's obligations with respect to special education services, including but not limited to the charter school's child find procedure, and how the charter

school would integrate its Montessori program with the provision of special education services. (Education Code section 47646(a), 5 C.C.R. section 11967.5.1(f)(1)(H).) Petitioners have not included a reasonably comprehensive description of a plan for how Charter School staff and administration would become trained in District and SELPA policies and procedures. Further, the Petition fails to address the potential difficulties created by students whose disabilities require instruction other than by the Montessori method, and whose areas of unique need must be met in smaller learning environments. The Petition strongly suggests that a special education student's unique needs must meet the Charter's pedagogical approach rather than the reverse, which is mandated by federal and state special education laws.

Measurable Pupil Outcomes and Assessment

The Petition focuses on teacher observation of Montessori activities and does not include external, research-based measurements that would inform intervention strategies. The Petition lacks a reasonably comprehensive plan for assessing and monitoring students in the grades first through third. In grades fourth through sixth the Petition is dependent upon the STAR, which is only one measure. In sum, the Petition fails to contain sufficiently defined measurable pupil outcomes, or alternative assessment measures beyond the traditional standardized measures.

Governance Structure:

The charter school's corporate bylaws contain an overly broad provision authorizing the charter school governing board to delegate the management of the charter school to a third-party management company. Since the party managing the charter school's operations would be a key contact point in the sponsoring district's oversight efforts, the Petition's proposal to allow the charter school to delegate management to a third party without restriction is too broad, and would impair the sponsoring district's oversight abilities.

The Petition states that the charter school board would comply with conflict of interest statutes applicable to school district board members, but the board's bylaws contain provisions that are inconsistent with these statutes, especially with respect to the provision allowing "interested persons" to participate in a board decision in which he/she holds a financial interest.

Personnel/Human Resources:

The Petition does not contain an adequate description of employee rights should the charter school employees exercise their right to organize and designate an exclusive representative. (Education Code section 47605(b)(5)(M)), 5 C.C.R. 11967.5.1(f)(3)(A)-(C)). Specifically, the Petition states that charter school employees would be at will and hired under agreements approved by the charter school board. The Petition fails to recognize, however, what would happen if the charter school's employees exercised their

rights to organize. The Petition also makes general references to employee return rights under District board policy and collective bargaining agreements without providing any detail as to what rights, if any, might be conferred by those sources.

Student Admissions: The Petition's student admissions policy does not contain the preferences required by Education Code section 47605(d)(2)(B) and 47605(d)(1). (Education Code section 47605(b)(5)(H), 5 C.C.R. 11967.5.1(f)(8).)

Student Discipline: The proposed student discipline policy fails to meet due process requirements (Education Code section 47605(b)(5)(J), 5 C.C.R. 11967.5.1(f)(10).) Specifically, the Petition's enumerated offenses initially track those of Education Code section 48900. However item (q) omits the definition of hazing, which raises a due process concern.

The Petition includes in its enumerated offenses grounds (i.e., terrorist threats, sexual harassment, hate violence, hostile environment) that are terms of art and that are not sufficiently defined for elementary-aged students. The discipline procedure also fails to limit jurisdiction to only those acts related to school activity or school attendance occurring within a school under the jurisdiction of the superintendent or principal or occurring within any other school district. This raises a due process concern.

The discipline procedure fails to track Education Code section 48915's conditions under which suspensions and expulsions must, as opposed to may, be recommended, which raises concerns as to whether discipline would be commensurate with the alleged act of wrongdoing; The policy also does not contain a reasonably comprehensive description of procedures where discipline results in a change of placement for child with a disability. The policy also does not provide a reasonably comprehensive description of interim alternative educational settings for students subject to suspension/expulsion.

Fiscal/Budget: The Petition fails to contain a viable proposed first-year operational budget, including startup costs, cashflow and financial projections for the first three years of operation (Education Code section 47605(g), 5 C.C.R. 11967.5.1(b)(3).)

The budget contains an unsubstantiated projected first-year enrollment of 100 students. However, given that the petitioners have increased their enrollment projections a number of times already in previous petitions, the latest projection is not realistic. Using the District's fiscal procedures and standards, staff assumed that the charter school's enrollment to be 72 students in year one, increasing by 20 students in the subsequent two years. Even adjusting the charter school's expenses based on this revised assumption, the District projects that the charter school would incur a deficit in net revenue of \$34,962 in year one, \$118,220 in year two, and \$138,720 in year three. The District was generous in its budgetary assumptions in that it utilized the petitioners' full assumptions regarding the receipt of State and Federal grants, even though the petitioners did not provide the requisite documentation verifying that such funds had been committed, and even though the District verified with the State that the Petitioners would not receive the full extent of

the funds that were earmarked as revenue. The petitioners' budget did not include any alternative or contingency plans if these sources of funding did not materialize, and also underestimates the charter school's special education encroachment.

Facility:

The charter fails to identify a facility for the charter school, or a strategic plan for identifying and securing the facility. (Education Code section 47605(g); 5 C.C.R. 11967.5.1(c)(3)(D)) The petition signatures reflect that most of the charter school's projected student population would come from outside of the District, which would prevent the charter school from qualifying for a facility under Proposition 39 (Education Code section 47614).

Objectives of Charter School Act:

The District's governing board was guided by the stated objectives of the Charter Schools Act, as set forth in Education Code section 47601:

It is the intent of the Legislature, in enacting this part, to provide opportunities for teachers, parents, pupils, and community members to establish and maintain schools that operate independently from the existing school district structure, as a method to accomplish all of the following:

- (a) Improve pupil learning.
- (b) Increase learning opportunities for all pupils, with special emphasis on expanded learning experiences for pupils who are identified as academically low achieving.
- (c) Encourage the use of different and innovative teaching methods.
- (d) Create new professional opportunities for teachers, including the opportunity to be responsible for the learning program at the schoolsite.
- (e) Provide parents and pupils with expanded choices in the types of educational opportunities that are available within the public school system.
- (f) Hold the schools established under this part accountable for meeting measurable pupil outcomes, and provide the schools with a method to change from rule-based to performance-based accountability systems.



LAW OFFICES OF SPECTOR, MIDDLETON, YOUNG & MINNEY, LLP

MARCH 25, 2009

VIA: U.S. MAIL AND FACSIMILE

PAUL C. MINNEY
JAMES E. YOUNG
MICHAEL S. MIDDLETON
DANIEL I. SPECTOR
LISA A. CORR
AMANDA J. MCKECHNIE
TIMOTHY M. WEIR

Sonoma County Board of Education
5340 Skylane Boulevard
Santa Rosa, CA 95403

Re: County Appeal of River Montessori Charter School Charter Petition

Dear Members of the Sonoma County Board of Education:

Our office serves as general counsel to River Montessori Charter School (“Charter School”). This letter is to inform you that the Charter School intends to appeal the denial of its charter petition by the Old Adobe Unified School District Board of Education (“District” or “Board”) to the Sonoma County Board of Education (“County”), as provided for in Education Code Section 47605(j)(1) and Title 5, California Code of Regulations Section 11967(b). Title 5, California Code of Regulations Section 11967(b) requires that a charter school whose petition has been denied and that wishes to appeal their petition to the county must send the following information within 180 days after the denial action:

- (1) A complete copy of the charter petition as denied, including the signatures required by Education Code section 47605. *A complete copy of the charter petition as denied is included behind tab A, including the signatures required by Education Section 47605 which are in appendix E of the denied charter petition.*
- (2) Evidence of the governing board's action to deny the petition (e.g. meeting minutes) and the governing board's written factual findings specific to the particular petition, when available, setting forth specific facts to support one or more of the grounds for denial set forth in Education Code section 47605(b). *A signed copy of the District's resolution, attesting to the Board's action to deny the charter is included behind tab B.*
- (3) A signed certification stating that petitioners will comply with all applicable law. *A signed certification stating that petitioners will comply with applicable law is included behind tab C.*
- (4) A description of any changes to the petition necessary to reflect the county board of education as the chartering entity as applicable. *The charter as denied by the District with redlined changes to reflect the County Board of Education as the authorizer is included behind tab D.*

JESSICA ADAMS ROBISON
JERRY W. SIMMONS
CHASTIN H. PIERMAN
JULIE D. ROBBINS
JAMES L. SHEA
KIMBERLY RODRIGUEZ
ANDREA C. SEXTON
SARAH J. KOLLMAN
JANELE A. RULEY
AMY L. ROBERTS

At its October 13, 2008 meeting, the District Board of Education voted to deny the charter petition for the creation of the Charter School. This appeal is therefore well within the 180 day limit. The Petitioners for the River Montessori Charter School continue to plan and prepare for operation to begin 2009-2010. Thus, in addition to the above listed items, please find the following supplemental materials within this binder:

- Tab E: The charter, as submitted to the District met or exceeded legal requirements. We have attached a chart with our responses to each of Old Adobe Unified School District's reasons for denial of the charter petition;
- Tab F: Supplementary samples and drafts of educational records to further support the Montessori Educational Model;
- Tab G: Special Education Changes
- Tab H: Updates to the River Montessori Charter School Budget;
- Tab I: Supplemental signatures;
- Tab J: Draft Emergency Management Plan;
- Draft Staff Handbook (accompanying orange folder);
- Tab K: A copy of the County's Sample Memorandum of Understanding ("MOU") that has been tailored by our Office to provide a starting point for negotiations between the County and the Charter School of a final MOU. We have provided a redlined version that shows the changes that have been made from the sample, and for ease of reading, a clean copy as well;
- Fundraising report (in the back insert); and
- RMCS Volunteer commitments (in the front insert).

We have also been in contact with the County and have reviewed County Board Policy 0420.4, and have attached the following, which are required by County Board Policy, but not by Education Code Section 47600 et. seq:

- The name, address and phone number of each applicant, together with a statement signed by each of them, formally applying to the Board for approval of the charter school. (We have included the name, address, and phone numbers for the lead petitioners in a letter immediately following this letter).
- A thorough description of the education, work experience, credentials, degrees and certifications of the individuals comprising, or proposed to comprise, the directors,

administrators and managers of the proposed charter school. (We have included biographies of the entire Board of Directors for River Montessori in the front insert).

- A list of consultants whom the charter school has engaged, or proposes to engage, for the purpose of developing, operating, and evaluating the charter school, together with a thorough description of the qualifications of such consultants (this was included in appendix B of original charter submitted to OAUSD and is copied here for ease of the County review).
- Tab L: An attorney's opinion or a narrative from the charter school applicant providing a thorough description of the potential civil liability, if any, of the charter school and the Sonoma County Office of Education or the district in the case of a petition initially denied by the Governing Board of a school district.

According to Title 5, California Code of Regulations Section 11967(d), no later than 60 days after receiving a complete petition package, and following review of the petition at a duly noticed public meeting, a county board of education shall grant or deny the charter petition. This time period may be extended by an additional 30 days if the county board of education and the charter school agree to the extension. We anticipate that the County will adhere to this timeline during its consideration of the charter petition.

* * *

We look forward to working with the County as it considers the charter petition of the Charter School that hopes to open its doors to children in July of 2009. Please feel free to contact me if you have any questions.

Sincerely,

LAW OFFICES OF SPECTOR,
MINNEY, LLP



LISA A. CORR
ATTORNEY AT LAW

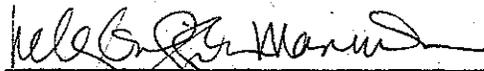
Sonoma County Board of Education
Re: County Appeal of River Montessori Charter School Charter Petition
November 12, 2008
Page 4 of 4

November 11, 2008
River Montessori Charter School
PO Box 2809
Petaluma, CA 94952
www.rivermontessori.org

To the Sonoma County Board of Education:

We are formally applying to the Sonoma County Board of Education for approval of the attached charter petition for the River Montessori Charter School.

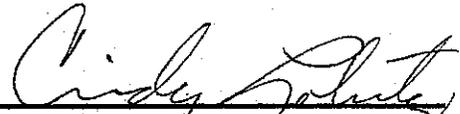
Signed



Kelly Griffith Mannion
Lead Petitioner

Date: 11/11/08

(707) 778-1541
3 Hill Drive
Petaluma, CA 94952-1759



Cindy Lohrentz
Lead Petitioner

Date: 11/11/08

(707) 765-6448
731 H Street
Petaluma, CA 94952

CERTIFICATION OF COMPLIANCE WITH APPLICABLE LAW
Per Title 5 California Code of Regulations § 11967(b)(3)

Overview

A charter petition that has been previously denied by the governing board of a school district may be submitted to the county board of education or the State Board of Education. (See Education Code § 47605(j)(1)). As per Education Code § 47605(j)(5), the State Board of Education has adopted regulations implementing the provisions of § 47605(j)(1). (See Title 5 California Code of Regulations § 11967).

Title 5 California Code of Regulations § 11967 requires that a charter school petition that has been previously denied by the governing board of a school district must be received by the county office of Education or State Board of Education not later than 180 calendar days after the denial. See, 5 CCR §11967. In addition, subdivision (b)(3) of §11967 requires the charter petitioner to provide a "signed certification of compliance with applicable law" when submitting the denied petition to the county office of education or State Board of Education.

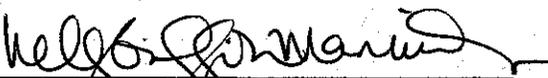
The following certification is submitted in compliance with 5 CCR §11967(b)(3).

Certification

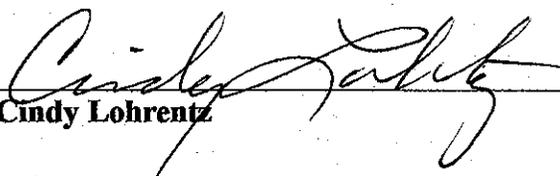
By signing below, I certify as follows:

1. That I am the lead petitioner, and that I am competent and qualified to certify to the facts herein;
2. That as lead petitioner I have personal knowledge of the facts forming the basis of this certification;
3. That I make this certification for purposes of §11967(b)(3) only; and
4. That charter petitioners and the charter itself are in compliance with applicable law.
5. The charter shall operate in full compliance with applicable law.

Date: 11/9/08



Kelly Griffith Mannion



Cindy Lohrentz

Petition Item	What OAUSD said:	Our Response
<p>a. A sound educational program that is likely to be of educational benefit to students. (Education Code section 47605(b)(5)(A); C.C.R. section 11967.5.1(f)(1)(A)):</p>	<p>i. Although parallels have been drawn with the Montessori teaching program and specific Montessori activities, it is difficult with this Petition to adequately assess the completeness of the program in relation to the California Standards. The Petition's plan for Standards aligned curriculum does not give sufficient weight to "key standards."</p>	<p>As required by law, RMCS considers all the content standards as equally weighted and will address <i>all</i> Content Standards consistently. Please see the Sample alignment included in Appendix G of the charter petition and additional samples and drafts of educational records found in our supporting documents to further explain how the Montessori philosophy provides a comprehensive educational model that is aligned with state standards.</p>
	<p>ii. The Petition lacks a reasonably comprehensive plan for assessing and monitoring students in the grades first through third. In grades fourth through sixth the Petition is dependent upon the STAR, which is only one measure.</p>	<p>In all grades, RMCS will conduct state tests (STAR) required to demonstrate student mastery and success. In addition, RMCS will implement the nationally normed Developmental Reading Assessment, 2nd Edition, (DAR2) in 1st through 6th grades and the Developing Writer's Assessment (DWA) in 4th grade, both by <i>Pearson</i>, as well as the Albanesi Educational Assessment for Reading in 1st through 6th grades. Albanesi assessments are analogous to a review at the end of a textbook chapter that align with Montessori learning materials and manipulatives. Non-state mandated Montessori measurements are administered in all grades and are listed in Section III of the Charter Petition. Assessment will be reviewed annually by the administration to determine success and alternate objective assessments. Parents, students and teachers will communicate findings with conferences and Report cards.</p>
	<p>iii. The Petition focuses on teacher observation of Montessori activities and does not include external, research based measurements which would inform intervention strategies.</p>	<p>Teacher observation is one of the many measurements conducted in a Montessori classroom. Please see Section III of the charter petition for a listing of alternative assessments including exams, portfolios, rubrics, and evaluations. Please see response to a. ii. above for further explanation.</p>

Petition Item	What OAUSD said:	Our Response
	<p>iv. The Petition does not adequately address the selection of and usage of standards aligned text books</p>	<p>The learning materials in a Montessori classroom do not typically include textbooks as a main learning tool, rather manipulatives allow the student to work with a concept concretely. However, all curriculum materials will be reviewed annually to ensure appropriateness, relevance and that it meets current mandates standards. A library of resource books and fiction books are available in each Montessori Classroom. Donated computers will be available to students to research projects.</p>
<p>b. A reasonably comprehensive plan to educate English Language Learner students. (5 C.C.R. section 11967.5.1(f)(1)(G))</p>	<p>The petition's plan to education EL students lacks sufficient detail regarding the standards and process for EL instruction, including placement, evaluation and redesignation.</p>	<p>All teachers at RMCS shall hold CLAD or a CCTC equivalent certification and will be familiar with the needs and instruction of the English Learner. Montessori learning materials include common components of a second language program in that they are concrete and integrated and offer a well-rounded sensorial experience illustrating an academic concept which allows the EL student to continue with studies and develop phonemic awareness, vocabulary, and comprehension, while language is progressing as a separate focus. Students will be assessed individually and supported accordingly. Please see Section II of the Charter Petition.</p>

Petition Item	What OAUSD said:	Our Response
<p>c. A reasonably comprehensive plan describing how the Charter School would identify and respond to the needs of pupils who are not achieving at or above expected levels. (Education Code section 47605(b)(5)(A); 5 C.C.R.section 11967.5.1(f)(1)(F))</p>	<p>The petition's proposed plan for low-achieving students lacks sufficient detail regarding standards for identification, assessment and integration. It also fails to adequately incorporate the Montessori teaching program.</p>	<p>Student progress will be monitored individually through record keeping, curriculum checklists, formal presentations, exams, teacher assessment, portfolios, rubrics, and evaluations, in addition to state mandated tests, the DRA, Albanesi tests, the DWA, and other non-mandated assessments. Weekly Work Plans (WWPs) and Individual Learning Plans (ILPs) are created to support and challenge the student within the Montessori environment. All Montessori subjects and materials are interrelated and integrated and develop a host of skills while allowing progression in any individual needs. Montessori includes direct instruction and is based on manuals of lessons, curriculum calendars/pacing guides. Instruction is easily modified and pacing is accelerated or slowed to meet the student's needs on an individual basis. Should a student struggle, a Student Study Team (SST) consisting of the teacher, parent, resource specialist, and principal, will look through the student's history and monitor the student for 6 months. If progress has not been made then the child will be tested to determine the appropriate course of support. Please see Sections II and III of the charter petition and support documents.</p>
<p>d. A plan for special education that contains a reasonably comprehensive description of the charter school's obligations with respect to special education services, including but not limited to the charter school's child find procedure, and how the charter school would integrate its Montessori program with the provision of special education services. (Education Code section 47646(a), 5 C.C.R.</p>	<p>The Petition lacks a reasonably comprehensive plan for special education. Petitioners have not included a reasonably comprehensive description of a plan for how Charter School staff and administration will become trained in District and SELPA policies and procedures. Whether Petitioners have sufficient knowledge among charter school staff and administration for undertaking joint responsibilities in the provision of special education services is not clear. The petitioner's reference to the child find procedure is cursory and underdeveloped, and the petition contains an insufficient</p>	<p>The language in the charter was in complete alignment with Education Code Section 47641(b), 47646 and, 20 U.S.C. 1415. The District's review failed to consider the obligation of the District as a local educational agency. In this appeal, the Petitioners have revised the charter to reflect County Board authorization and thus have provided written affirmation of the School to become an LEA and join the Sonoma SELPA. See the attached plan for the provision of Special Education and services for children identified for Spec Ed services. RMCS will provide or procure all needed special education services to offer a free appropriate public education for each of its students. Each classroom Montessori teacher,</p>

Petition Item	What OAUSD said:	Our Response
<p>section 11967.5.1(f)(1)(H))</p>	<p>description of the identification and assessment procedures to be used, other than the very general statement that “[a]necdotal data supports the assertion that children who have early Montessori training are more likely to have their exceptional gifts and challenges identified and an environment for nurturing these gifts and challenges provided.”</p> <p>Further, the Petition fails to address the potential difficulties created by students whose disabilities require instruction other than by the Montessori method, and whose areas of unique need must be met in smaller learning environments. The Petition strongly suggests that a special education student’s unique needs must meet the Charter’s pedagogical approach rather than the reverse, which is mandated by federal and state special education laws.</p>	<p>together with the Resource Specialist, will create a learning environment and provide necessary resources for each child based on their unique abilities. In fact this is part of the basis of the Montessori model of education.</p> <p>The RMCS Board and staff will receive regular training in Special Education policies, including Charter School and Sonoma SELPA protocols and procedures. Sebastopol Independent Charter School, a Local Education Agency (LEA) for special education, has agreed to train and provide support to RMCS’ Director and special education coordinator (Resource Specialist).</p>
<p>e. Measurable pupil outcomes and methods for measuring pupil outcomes. (Education Code section 47605(b)(5)(B) and (C), 5 C.C.R. 11967.5.1(f)(2) and (3))</p>	<p>The petition fails to contain sufficiently defined measurable pupil outcomes, or alternative assessment measures beyond the traditional standardized measures.</p>	<p>In addition to meeting the measurement requirements of California State Standards, RMCS has numerous assessments in place to ensure student success, including individualized observation and evaluation, nationally-normed tests, and criterion referenced tests. Please see definitions of assessments listed in Section III of the Charter Petition. Parents and administrators review reports at a minimum of once per quarter. Individual Learning Plans (ILPs) and Weekly Work Plans (WWPs) are evaluated and attended to weekly and amended to ensure sufficient progress and student success.</p>

Petition Item	What OAUSD said:	Our Response
<p>f. The bylaws which would govern the non-profit public benefit corporation governing the charter school. (Education Code section 47605(b)(5)(D), 5 C.C.R. 11967.5.1(f)(4))</p>	<p>The bylaws contain a provision authorizing the governing board to delegate the management of the charter school to a third-party management company that is too broad and undeveloped.</p> <p>The charter petition states that the charter school board will comply with conflict of interest statutes applicable to school district board members, but the board's bylaws contain provisions that are inconsistent with these statutes.</p>	<p>The charter petition is the controlling document and takes precedence over the bylaws. If necessary the bylaws can be amended from time to time to maintain consistency with all state statutes applicable to charter schools.</p> <p>The bylaws have been updated since charter submission to the District to reflect limits to delegation and conflicts procedures compliant with the Political Reform Act, the Corporations Code and Government Code Section 1090.</p>
<p>g. Human Resources (Education Code section 47605(b)(5)(E)), 5 C.C.R. 11967.5.1(f)(5))</p>	<p>The petition does not contain an adequate description of employee rights should the charter school employees exercise their right to organize and designate an exclusive representative.</p>	<p>As stated by River representatives during the Old Adobe Hearing on 9/9/08, by law, we can neither force our employees to join a collective bargaining unit nor prevent employees from doing so. The charter contains the appropriate designation of the public school employer as required by Education Code Section 47605(o). The section cited by the District (47605(b)(5)(E)) does not relate to collective bargaining.</p>
<p>i. A suspension/expulsion procedure that meets due process requirements (Education Code section 47605(b)(5)(J), 5 C.C.R. 11967.5.1(f)(10).)</p>	<p>The proposed student discipline policy is not reasonably comprehensive in that:</p>	<p>The District claims that the suspension and expulsion policy is not reasonably comprehensive because it does not include a number of elements that are imbedded in the suspension and expulsion section of the Education Code (Sections 48900, et seq.). The District has provided no legal authority upon which it bases this determination. The District erroneously infers that the Charter School is required to include elements from Education Code Section 48900 et seq. However, under Education Code Section 47610, often referred to as the "mega-waiver", a charter school is exempt from all laws that apply to school districts, with few exceptions, inapplicable here.</p>

Petition Item	What OAUSD said:	Our Response
	<p>The Petition's enumerated offenses initially track those of Education Code section 48900. However item (q) omits the definition of hazing, which raises a due process concern;</p>	<p>Education Code Section 47605(b)(5)(J) specifies that as part of a charter petition, the Petitioners shall include the procedures by which pupils can be suspended or expelled. This affirmative statement clearly demonstrates that a charter school may have a suspension and expulsion policy that differs from that provided for the Education Code Sections 48900 et. seq. As such, the Charter School is not bound by the specific definitions in this section of the Education Code, nor does the suspension and expulsion policy legally need to mirror the Education Code.</p> <p>Therefore, a suspension and expulsion policy may be unique to a charter school.</p> <p>This paragraph shall serve as introduction to each of the responses provided below regarding our suspension and expulsion policy.</p> <p>There is no legal requirement for a charter school to include hazing within the enumerated offenses that may lead to suspension or expulsion. The enumerated offenses include language which would allow the school to address any concerns regarding hazing through other enumerated offenses, such as:</p> <ol style="list-style-type: none"> 1. Caused, attempted to cause, or threatened to cause physical injury to another person. 2. Willfully used force of violence upon the person of another, except self-defense. 3. Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, other school officials, or other school personnel engaged in the performance of their duties.

Petition Item	What OAUSD said:	Our Response
	<p>The Petition includes in its enumerated offenses grounds (i.e., terrorist threats, sexual harassment, hate violence, hostile environment) that are terms of art and that are not sufficiently defined for elementary-aged students;</p>	<p>These enumerated offenses would allow the charter school administration to deal with hazing behavior.</p> <p>The Charter School, however, would be willing to amend this section of the petition to provide for a further definition.</p> <p>Specifically, the charter school is willing to amend the enumerated offenses to include hazing and to read:</p> <p>“Engaged in, or attempted to engage in hazing. For the purposes of this subdivision, “hazing” means a method of initiation or preinitiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this subdivision, “hazing” does not include athletic events or school-sanctioned events.”</p> <p>The District claims that the enumerated offenses include items that are terms of art, and are not sufficiently defined for elementary-aged students. The District does not provide any legal authority for this position. Further, as described above, the charter school is not legally required to mirror the enumerated offenses in Education Code 48900.</p> <p>The policy meets the standard for due process and notice by enumerating all the offenses for which a pupil may be suspended or expelled. As noted in the findings, some terms utilized in the enumerated offenses are terms of art. As such, they do not need to be further defined.</p>

The Charter School, however, would be willing to amend this section of the petition to provide for a further clarification of the identified terms of concern:

“Made terrorist threats against school officials and/or school property. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school district property, or the personal property of the person threatened or his or her immediate family.”

“Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment.

“Caused, attempted to cause, threaten to cause or participated in an act of hate violence,

This section shall apply to pupils in any of grades 4 to 12, inclusive.”

	<ul style="list-style-type: none"> • The discipline procedure fails to limit jurisdiction to only those acts related to school activity or school attendance occurring within a school under the jurisdiction of the superintendent or principal or occurring within any other school district. This raises a due process concern; 	<p>“Caused, attempted to cause, threaten to cause or participated in an act of hate violence, “Caused, attempted to cause, threaten to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This section shall apply to pupils in any of grades 4 to 12, inclusive.”</p> <p>“Intentionally harassed, threatened or intimidated a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading student rights by creating an intimidating or hostile educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.”</p> <p>The language in Section B of the Suspension and Expulsion policy essentially mirror the jurisdiction statement in Education Code 48900(r), which demonstrates that there are no due process issues.</p> <p>The grounds for suspension and expulsion are clearly defined in the petition. Specifically, the policy provides that the misconduct must be related to school activity or attendance. As such, the location of the misconduct may or may not be on other District sites.</p> <p>As provided for by <i>Freemont Union High School District v. Santa Clara County Board of Education</i> (1991) 235 Cal App.3d 1182, the location of the misconduct, whether on the pupil's own school site or on a different school site, as long as there is a nexus to school activity or attendance. Section B clearly limits jurisdiction to any act that is related to school activity or attendance. As such, the District claims on this issue are invalid.</p>
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	<ul style="list-style-type: none">• The discipline procedure fails to track Education Code section 48915's conditions under which suspensions and expulsions must, as opposed to may, be recommended, which raises concerns as to whether discipline would be commensurate with the alleged act of wrongdoing	<p>The District claim that the failure to track Education Code Section 48915's conditions under which suspension and expulsions must be recommended raises concerns as to whether discipline would be commensurate with the alleged act of wrong doing is absurd. The District fails to provide any legal authority or evidence upon which it bases its assumption. Further, as stated clearly above, Education Code Section 48915 does not apply to charter schools. Most charter schools avail themselves of the flexibility found in Education Code Section 47610 by freeing themselves from the strict tie to Education Code Section 48915 without compromising student due process.</p>
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• The policy does not contain a reasonably comprehensive description of procedures where discipline results in a change of placement for child with a disability.

The preamble to the Policy clearly states that the School will follow Section 504 of the Rehabilitation Act, Individuals with Disabilities in Education Act, the Americans with Disabilities Act and all federal and state laws when imposing any form of discipline on a student identified as an individual with a disability or for whom the School has a basis of knowledge of a suspected disability or who is otherwise qualified for such services or protections. This area of the law is clearly delineated in statute, and thus is not necessary to be repeated verbatim in the policy itself. A pupil's IEP team determines an appropriate interim alternative educational setting for a student with a disability. As such, it would be inappropriate for a policy to include a specific interim alternative setting for pupils in need of such setting. As a school of the district for special education purposes, the charter school would have worked with district special education officials to identify appropriate options for interim alternative education settings for any special education student that may need one. As an LEA, and member of the Sonoma County SELPA, the Charter School will consider all public and non-public options available as aligned the SELPA policies.

Should it be necessary for the School to add provisions to the Suspension and Expulsion Policy to align with SELPA policy, the Charter School, is comfortable adding a section to the Suspension and Expulsion Policy to provide for a further information regarding the discipline of students with special needs given that it will be operating as an LEA:

"N. Special Procedures for the Consideration of Suspension and Expulsion of Students with Disabilities

i. Services During Suspension

Students suspended for more than ten (10) school days in a school year shall continue to receive services so as to enable the student to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP; and receive, as appropriate, a functional behavioral assessment or functional analysis, and behavioral intervention services and modifications, that are designed to address the behavior violation so that it does not recur. These services may be provided in an interim alternative educational setting.

ii. Procedural
Safeguards/Manifestation
Determination

Within ten (10) school days of a recommendation for expulsion or any decision to change the placement of a child with a disability because of a violation of a code of student conduct, the Charter School, the parent, and relevant members of the IEP Team shall review all relevant information in the student's file, including the child's IEP, any teacher observations, and any relevant information provided by the parents to determine:

- a) If the conduct in question was caused by, or had a direct and substantial relationship to, the child's disability; or
- b) If the conduct in question was the direct result of the local educational agency's failure to implement the IEP

If the Charter School, the parent, and relevant members of the IEP Team determine that either of the above is applicable for the child, the conduct shall be determined to be a manifestation of the child's disability.

		<p>If the Charter School, the parent, and relevant members of the IEP Team make the determination that the conduct was a manifestation of the child's disability, the IEP Team shall:</p> <ul style="list-style-type: none">a) Conduct a functional behavioral assessment or a functional analysis assessment, and implement a behavioral intervention plan for such child, provided that the Charter School had not conducted such assessment prior to such determination before the behavior that resulted in a change in placement;b) If a behavioral intervention plan has been developed, review the behavioral intervention plan if the child already has such a behavioral intervention plan, and modify it, as necessary, to address the behavior; andc) Return the child to the placement from which the child was removed, unless the parent and the Charter School agree to a change of placement as part of the modification of the behavioral intervention plan. <p>If the Charter School, the parent, and relevant members of the IEP team determine that the behavior was not a manifestation of the student's disability and that the conduct in question was not a result of the failure to implement the IEP, then the Charter School may apply the relevant disciplinary procedures to children with disabilities in the same manner and for the same duration as the procedures would be applied to students without disabilities.</p> <p>iii. Due Process Appeals</p> <p>The parent of a child with a disability who disagrees with any decision regarding placement, or the manifestation determination, or the Charter School believes that maintaining the current placement of</p>
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		<p>the child is substantially likely to result in injury to the child or to others, may request an expedited administrative hearing through the Special Education Unit of the Office of Administrative Hearings.</p> <p>When an appeal relating to the placement of the student or the manifestation determination has been requested by either the parent or the Charter school, the student shall remain in the interim alternative educational setting pending the decision of the hearing officer or until the expiration of the forty-five (45) day time period provided for in an interim alternative educational setting, whichever occurs first, unless the parent and the Charter School agree otherwise.</p> <p>iv. Special Circumstances</p> <p>Charter School personnel may consider any unique circumstances on a case-by-case basis when determining whether to order a change in placement for a child with a disability who violates a code of student conduct.</p> <p>The Principal or designee may remove a student to an interim alternative educational setting for not more than forty-five (45) days without regard to whether the behavior is determined to be a manifestation of the student's disability in cases where a student:</p> <ul style="list-style-type: none">a) Carries or possesses a weapon, as defined in 18 USC 930, to or at school, on school premises, or to or at a school function;b) Knowingly possesses or uses illegal drugs, or sells or solicits the sale of a controlled substance, while at school, on school premises, or at a school function; orc. Has inflicted serious bodily injury, as defined by 20 USC 1415(k)(7)(D), upon a person
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		<p>while at school, on school premises, or at a school function.</p> <p>v. Interim Alternative Educational Setting</p> <p>The student's interim alternative educational setting shall be determined by the student's IEP team.</p> <p>vi. Procedures for Students Not Yet Eligible for Special Education Services</p> <p>A student who has not been identified as an individual with disabilities pursuant to IDEIA and who has violated the district's disciplinary procedures may assert the procedural safeguards granted under this administrative regulation only if the Charter School had knowledge that the student was disabled before the behavior occurred.</p> <p>The Charter School shall be deemed to have knowledge that the student had a disability if one of the following conditions exists:</p> <p>a) The parent/guardian has expressed concern in writing, or orally if the parent/guardian does not know how to write or has a disability that prevents a written statement, to Charter School supervisory or administrative personnel, or to one of the child's teachers, that the student is in need of special education or related services.</p> <p>b) The parent has requested an evaluation of the child.</p> <p>c) The child's teacher, or other Charter School personnel, has expressed specific concerns about a pattern of behavior demonstrated by the child, directly to the director of special education or to other Charter School</p>
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	<ul style="list-style-type: none"> • The policy does not provide a reasonably comprehensive description of interim alternative educational settings for students subject to suspension/expulsion 	<p>supervisory personnel.</p> <p>If the Charter School knew or should have known the student had a disability under any of the three (3) circumstances described above, the student may assert any of the protections available to IDEIA-eligible children with disabilities, including the right to stay-put.</p> <p>If the Charter School had no basis for knowledge of the student's disability, it shall proceed with the proposed discipline. The Charter School shall conduct an expedited evaluation if requested by the parents; however the student shall remain in the education placement determined by the Charter School pending the results of the evaluation.</p> <p>The Charter School shall not be deemed to have knowledge of that the student had a disability if the parent has not allowed an evaluation, refused services, or if the student has been evaluated and determined to not be eligible.”</p> <p>See above.</p>
<p>j. Financial statements that include a viable proposed first-year operational budget, including startup costs, and cashflow and financial projections for the first three years of operation (Education Code section 47605(g), 5 C.C.R. 11967.5.1(b)(3).)</p>	<p>The budget contains an unsubstantiated projected first-year enrollment of 100 students. However, given that the petitioners have increased their enrollment projections a number of times already in previous petitions, the latest projection is not realistic. Using the District's fiscal procedures and standards, staff assumed that the charter school's enrollment to be 72 students in year one, increasing by 20 students in the subsequent two years. Even adjusting the charter school's expenses based on this revised assumption, the District projects</p>	<p>The River petitioners did not change their enrollment projections after submitting the charter to Old Adobe District (see original charter), nor did we increase the enrollment during our previous charter petition process. We increased the school from 60 to 100 students, as advised by the Sonoma County Board of Education members, prior to submission to Old Adobe District.</p> <p>Parents of sixty-eight children signed the charter petition (above the required 50% required by law) (Education Code Section 47605(a)). See attached in supplemental appeals packet information for additional parents who have since</p>

	<p>that the charter school would incur a deficit in net revenue of \$34,962 in year one, \$118,220 in year two, and \$138,720 in year three. The District was generous in its budgetary assumptions in that it utilized the petitioners' full assumptions regarding the receipt of State and Federal grants, even though the petitioners did not provide the requisite documentation verifying that such funds had been committed. The petitioners' budget did not include any alternative or contingency plans if these sources of funding did not materialize, and also underestimates the charter school's special education encroachment.</p>	<p>signed, bringing total to 97 students. Signatures from parents of younger children are also included in the supplemental material to show large base of support amongst future parents as well.</p> <p>In addition, OAUSD's analysis failed to take into account a reasonable logic model for meeting our budget should we fail to meet our projected enrollment, such as not increasing the amount of space we would be leasing, purchasing furniture and materials only for classrooms that would actually be occupied, and paying for professional development only for teachers that were actually on payroll. OAUSD also failed to provide RMCS with a special education encroachment estimate after our timely request for such information.</p> <p>As noted to OAUSD in an Oct. 2 email, the CDE can easily confirm that the charter school planning and implementation (P&I) grant is non-competitive in 2008-09. Obviously CDE is not able at this time to provide written commitment that we will receive the P&I grant. The RMCS charter petition and accompanying documents have been reviewed by consultants and counsel familiar with the grant regulations to ensure that the petition meets all of the requirements of the P&I grant.</p>
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<p>k. Identification of a facility, or a legally timely request for a facility to the District under Education Code section 47614, or proper identification of all of the legal requirements necessary for use and occupation of the facility, or allocation of resources to secure a facility (Education Code section 47605(g); 5 C.C.R. 11967.5.1(c)(3)(D))</p>	<p>The charter fails to identify a facility for the charter school, or a strategic plan for identifying and securing the facility. The petition signatures reflect that most of the charter school's projected student population would come from outside of the District, which would prevent the charter school from qualifying for a facility under Proposition 39.</p>	<p>Our goal, which has not changed, is to find a location that will house the new River Montessori Charter School within the boundaries of Old Adobe Union School District, in which (OAUSD) we petitioned. When we created the charter, we enlisted several parents to join the site search committee. We have visited many commercial sites that could house our school for the first three to five years.</p> <p>We have worked closely with real estate agent, Mr. Mike Derby. Mr. Derby is with Westgate Realty located in Petaluma. Mr. Derby has been a Petaluma resident for more than 35 years and a full-time real estate professional for 20 years. His expertise in the real estate market has provided us with numerous potential school sites.</p> <p>We have narrowed our possible sites to commercial sites located off of Lakeville Highway. All sites are within OAUSD boundaries. They provide not only sufficient and modern classroom space but also safe drop-off and an outdoor play area. RMCS will ensure that all State Architect Office and California Education Codes related to charter school sites are followed.</p> <p>Lease rates are in line with our budget, most between \$1.25/square foot and \$1.50/square foot. The expense for any needed interior build-out will be covered with the charter school revolving loan fund, which can be applied for during the start-up period. The cost of tenant improvements will be capitalized over the life of the lease. There is ample flexibility in our current budget to absorb any additional costs related to the site as outlined above.</p>
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<p>2. (Education Code section 47605(b)(2); 5 C.C.R. 11967.5.1(c)(2)).</p>	<p>The Board also finds that the Petitioners are demonstrably unlikely to successfully implement the program set forth in the Petition due to “unfamiliarity with the requirements of law that would apply to the proposed charter school,” for the reasons set forth above.</p>	<p>Given the misinterpretation of the law as described in the findings by the District, the Petitioners feel strongly that it has a better grasp on the law that would apply to the Charter School than the District.</p>
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November 9, 2008

Dear Sonoma County Board of Education:

Following please find supplementary samples and drafts of educational records to further support the Montessori philosophy, document the comprehensive nature of our educational model, and illustrate curriculum mapping and pacing. Please note that these are in addition to the alignment and scope and sequence that are included in our charter. It is our intention that all processes both educationally and administratively will be addressed on a regular basis during the school year by a review team consisting of administration and staff to ensure that both student needs and state requirements are being met.

- 1) Elements of a Montessori Charter School
An Overview of the Montessori philosophy and practice in a public school environment.
- 2) General Overview of Elementary Curriculum
Two documents, *1st and 3rd Year* and *3rd and 4th Year*
Montessori academic programming briefly organized by year and subject matter.
- 3) Lesson Plans
Sample lesson plans to illustrate Montessori learning materials, teacher lessons.
- 4) Weekly Work Plan
A sample of a child's weekly plan and accomplishment record of all academic work.
- 5) Individual Learning Plan
A sample yearly agreement between student, parent, and teacher reviewed regularly to determine and ensure individual student success.
- 6) Curriculum 6-9 Class: Cultural Studies
A sample yearly schedule of the subjects of Zoology, Botany, and History in the Montessori Classroom for each level of the lower elementary class: Level One/First Grade, Level Two/Second Grade, Level Three/Third Grade. All subject matter is taught as an interrelated whole.
- 7) Curriculum 6-9 Class: Geometry
A sample yearly schedule of Geometry in the Montessori Classroom for each level of the lower elementary class: Level One/First Grade, Level Two/Second Grade, Level Three/Third Grade. As will all subjects, geometry is taught as one facet of an interrelated whole.

River Montessori Charter School is committed to success in our educational programming. RMCS is earnestly interested in establishing a rapport with our authorizer and providing documentation to meet our state requirements and common interests. Should you have any questions or concerns, please let us know; we are available any time.

Sincerely,

Kelly Griffith Mannion, M.Ed.
River Montessori Charter School Board of Directors, President

Elements of a Montessori Charter School

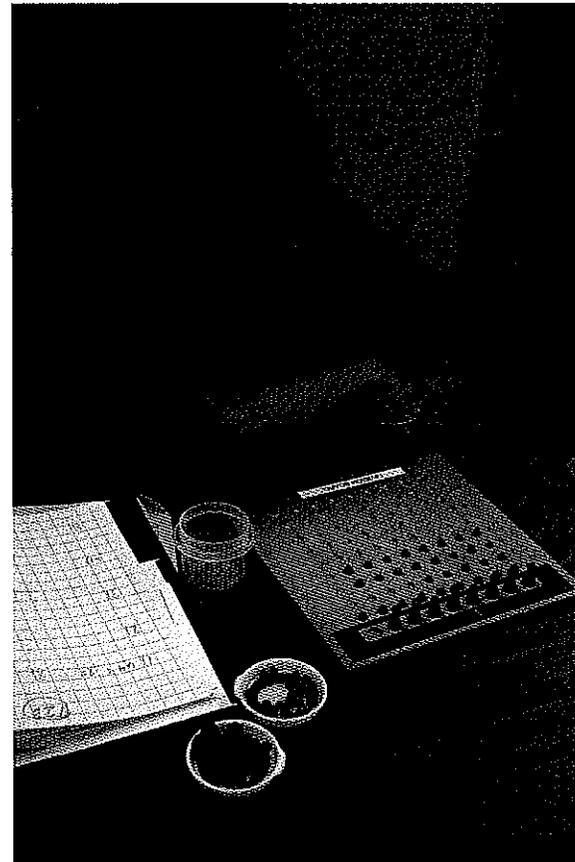


Montessori at a glance

Elements of a Montessori Charter Classroom

Montessori Materials

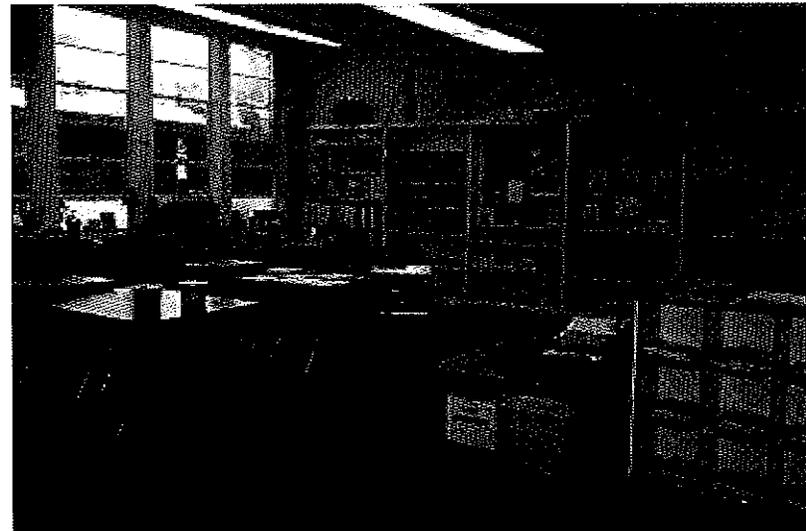
- Provide concrete materials for all subject matter
- Are self correcting
- Lead from concrete to abstract
- Cater to different learners
- Build focus, concentration, and control of movement
- Allow for spontaneous discovery
- Interest and motivate



Elements of a Montessori Charter Classroom

The Prepared Classroom

- Develop a sense of order
- Are clean and tidy
- Provide a variety of work space
- Set up for independence-
supplies and materials are
accessible to students
- Support student participation in
responsibility of maintaining
their environment
- Use community supply areas
- Build a consistent flow with
materials grouped by subject,
sequenced by difficulty.
- Provide students with a
peaceful area to problem solve
or reflect



Elements of a Montessori Charter Classroom

Aesthetic Elements

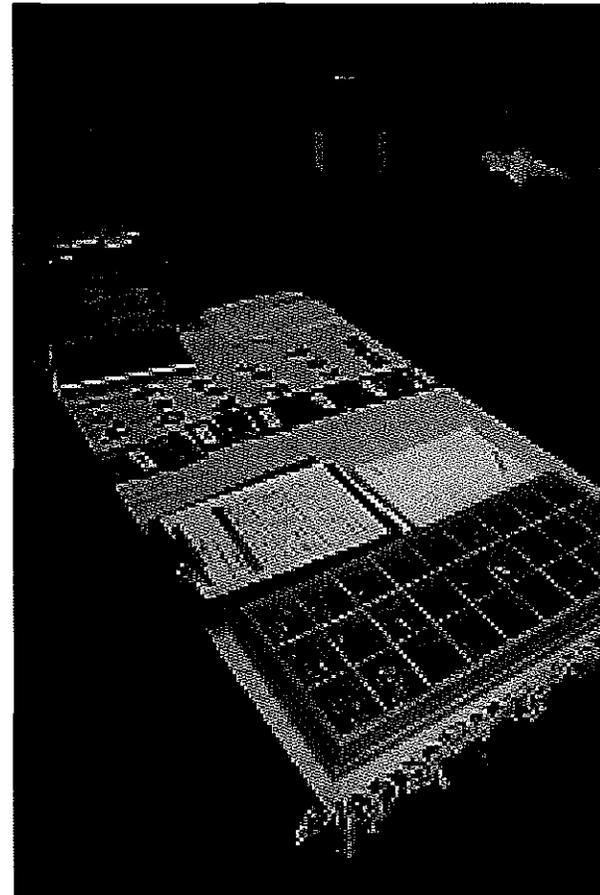
- Create a safe and soothing place to learn and explore
- Display as well as use Art/Music
- Grow plants and animals
- Contain beautiful materials that are complete and well cared for
- Use real life artifacts and specimens
- Preferred the use of soft textures, neutral colors and natural products
- Offer soft and natural lighting



Elements of a Montessori Charter Classroom

Individual Learning

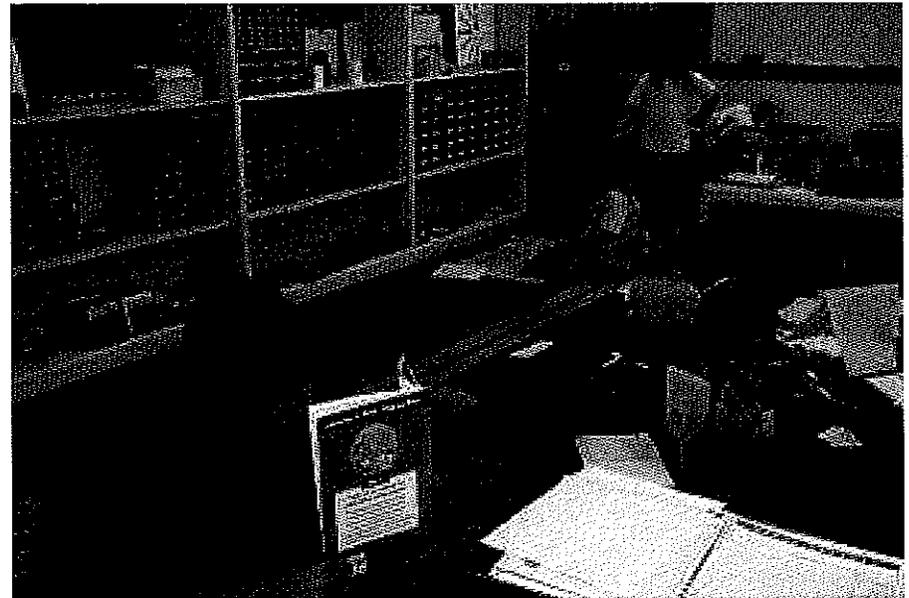
- Students learn at their own pace
- Students are empowered to manage their progress
- Teachers assess and monitor progress
- Teachers continually check for comprehension and understanding
- Challenges different levels
- Are guided by a comprehensive Montessori Curriculum which meets or exceeds CA state Standards



Elements of a Montessori Charter Classroom

Managing the Multi-level Classroom

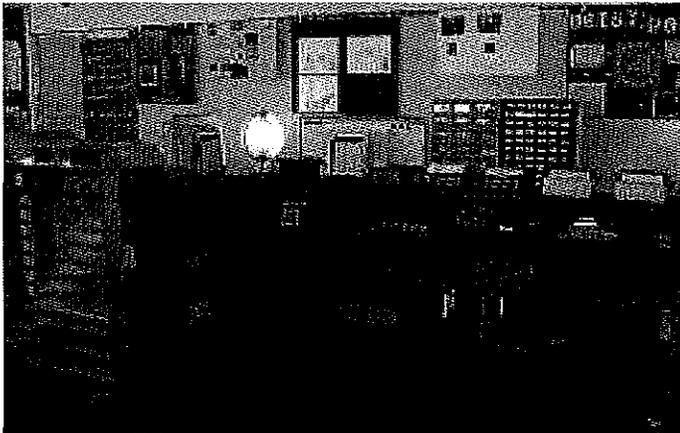
- Individual learning plans
- Weekly work plans
- Sequenced Montessori Curriculum
- SRA
- Quantitative/Qualitative Assessment
- Students Portfolios
- Assessment and record keeping
- Rubrics
- Parent/Teacher, Child collaboration
- Mentor teaching/planning support



Elements of a Montessori Charter Classroom

Blending Montessori with California State Standards

- Awareness of Montessori Curriculum that matches the CA standards
- Using Montessori Materials to teach standards
- Creating Montessori lessons for standards not in curriculum
- Using Cultural Lessons; Science, Geography, Botany and Zoology to teach science and social studies standards
- Extended learning time, Montessori students exceed mandated minutes
- State mandated Assessment



Elements of a Montessori Charter Classroom

Montessori Teachers...

- Create a trusting Student/Teacher relationship
- Facilitate student learning
- Foster independence
- Speak to the children at their eye level
- Speak softly and sincerely
- Teach thinking
- Encourage students to research and solve their own problems
- Practice positive discipline
- Spark Imagination
- Allow for self discovery
- Mirror life-long learning



Elements of a Montessori Charter Classroom

Characteristics of Students

- Are happy and calm
- Take ownership of learning
- Demonstrate self-discipline
- Are intrinsically motivated
- Show respect for self and others
- Embody independence/self confidence
- Take learning to higher level
– abstract thinkers with a strong concrete foundation



Elements of a Montessori Charter Classroom

Desired Results of a Montessori Education

- Students who are prepared to effectively lead our global community into the 21st century



General Overview of Elementary Curriculum (1st and 2nd Year)

HISTORY

- Concept of Time**
- Regular Unit of Measure**
- Use of a Calendar**
- Time Line of My Family**
- Short History of My Life**
- Grammar & Time**
- Year and Its Parts**
- Fundamental Needs of Humans**
- Golden Bead Material and Time**
- Stages in Progress of Civilization - Presentations A, B, C**
- History Experiments A-G**
- Impressionistic Charts 1-6**
- Clock of Eras**
- The Story of Life on Earth**
- Time Line of Life >General Presentation**
- Time Line Rope >General Presentation**

GEOGRAPHY

- Introduction to Land and Water**
- Land Forms**
- Map of the Hemispheres - Trace Maps**
- The Solar System**
- Layers of the Earth**
- Flag Work - Parts of the Flag**
- Dynamic Geography - Experiments**
- Continent Studies**
 - North America**
 - Asia**
 - Africa**
 - Antarctica**
 - Europe**
 - South America**
 - Australia**

ZOOLOGY

- Vertebrate/Invertebrate Sorting**

5 Classes of Vertebrates
Animal Skeletons
First Knowledge Animal Questions
Organization of Animal Kingdom
Classification of Concept - Nest of Dolls
Classified Nomenclature - Birds - Mammals
Vertebrate and Invertebrate Charts
Introduction to Invertebrates

BOTANY

Needs of the Plant
Uses of the Plant
Types of Roots
Erect Stems
Aerial and Subterranean Stems
Parts of the Leaf
Forms of Leaves
Parts of Flowers

MATH

Sums Greater than Ten
Sums Less than Ten
Associative Property of Addition
Advanced Snake Game
Addends Greater than Ten
Introductions to Fractions
Adding with Fractions - Like Denominators
Negative Snake Game
Passage from Addition Chart 1 - Chart 2
Multiplication by 10
Distribution Property of Multiplication
Building of Squares
Analysis of a Square
Passage from One Square to a Successive Square
Passage from One Square to a Non-Successive Square
Division Stamp Game
and Fractions

GEOMETRY

Geometric Cabinet - All Seven Trays
Geometric Solids

Solid To Point

Surface

Line

Point

Point to Solid

Formal Presentation of Geometry Sticks

The Line and Its Parts

Presentation of a Plane

Position of a Line

Moving From Plane in Space to Work Plane

Love Story

Types of Angles

Parts of an Angle

LANGUAGE

Psychological Presentation

Spoken Language

Written Language

Reading

Secret Messages

Level of Reading Words

Permanent Objects

Movable Objects

Objects of Miniature Environment

Action Cards

Puzzle Words - Mystery Words

Word Study

Level of Reading Sentences

Command Cards

Correct Expressions

Interpretive Reading - Depends on the Child's Reading Ability

GRAMMAR

Presentation 1 - The Noun

Presentation 2 - The Article

Presentation 3 - The Adjective

The Flower Game

Symbols of Noun Family

Position of Adjective

Paper Game
Detective Adjective Game
Presentation 4 - The Conjunction
Conjunction and the Miniature Environment
Presentation 5 - Function of Verb
Presentation 6 - The Adverb
Presentation 7 - The Pronoun
Presentation 8 - The Interjection

General Overview of Elementary Curriculum (3rd and 4th Year)

HISTORY

- Time Line of Humans**
- Presentation**
- Contents of Arrows**
- Stone Age Cultures--Pictures and Stories**
- Early Great Civilizations**

GEOGRAPHY

- Movements of the Earth and Their Consequences**
- The Atmosphere and Its Phenomena**
- The Hydrosphere and Its Phenomena**

ZOOLOGY

- Classified Nomenclature - Invertebrates**
- Classified Nomenclature - Internal Parts of Vertebrates**

BOTANY

- Classified Nomenclature and Experiments - Level 3**
- First Knowledge**
- First Knowledge Stories**
- Botany Impressionistic Charts**
- Plant Classification Charts**

MATH

- Elementary Exercises**
- The Bank Game**
- Test Tube Division**
- Powers of Numbers**
- Fractions--Chapter 1**
- Multiples**
- Decomposing a Number into Prime Factors**
- Find the L.C.M. and G.C.D.**
- Divisibility**

Fractions--Chapter 2

- Addition of Unlike Denominators**
- Subtraction of Unlike Denominators**
- Multiplication: Whole x Fraction**
- Multiplication: Fraction x Fraction**
- Division: Whole + Fraction**
- Division: Fraction + Fraction**

Decimal Fractions

- Decimal Numbers**
- The Hundredth Circle**
- Decimal Numbers--Operations**
- Decimal Checkerboard**

New Math

- Finding the Value of Numbers Written in Different Systems of Numeration**
- Introduction to New Math--Psychological Presentation**
- Systems of Numeration**
- The First Law of Any System**
- Sandpaper Numerals**
- Other Names for Each System**
- Number Rods and Numerals**
- The Digit Board**
- Non-decimal Systems**
- Two Voices--Two Systems**
- Egyptian Hieroglyphic System of Numeration**

GEOMETRY

Knowledge of the Plane Figures (Classified Nomenclature)

Polygons

Quadrilaterals

- Study of quadrilaterals**
- Parts of quadrilaterals**
- The trapezoid in detail**
- From irregular to regular polygons**
- Parts of polygons with more than four sides**

Circles

Congruency, Similarity, Equivalency Concepts

- Congruency, Similarity, Equivalency**
- Constructive Triangles**
- Insets of Equivalency**

From the Surface to the Area of a Plane Figure

LANGUAGE

Grammar Charts

Logical Analysis

Principal Parts of Irregular Verbs

Verb Forms

Complete conjugation of the verb "to love"

11

12

13

14

15

16

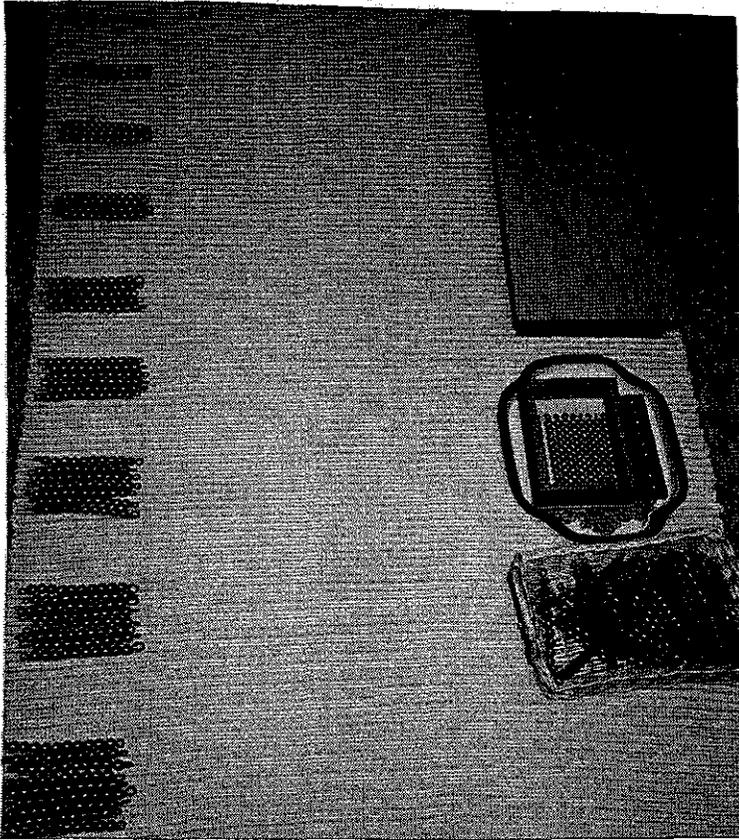
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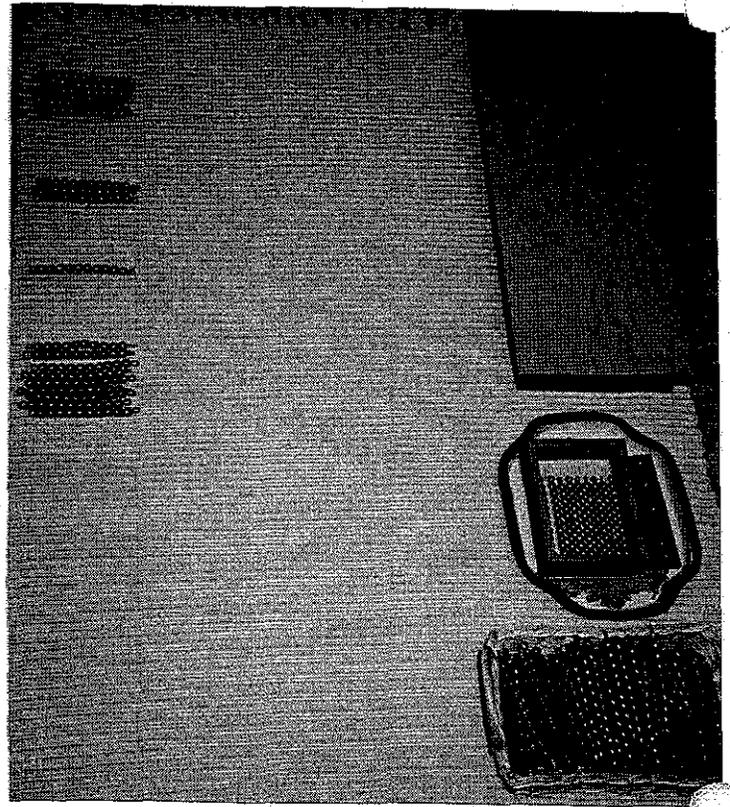
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Mathematics II

Introduction to Teens and Tens

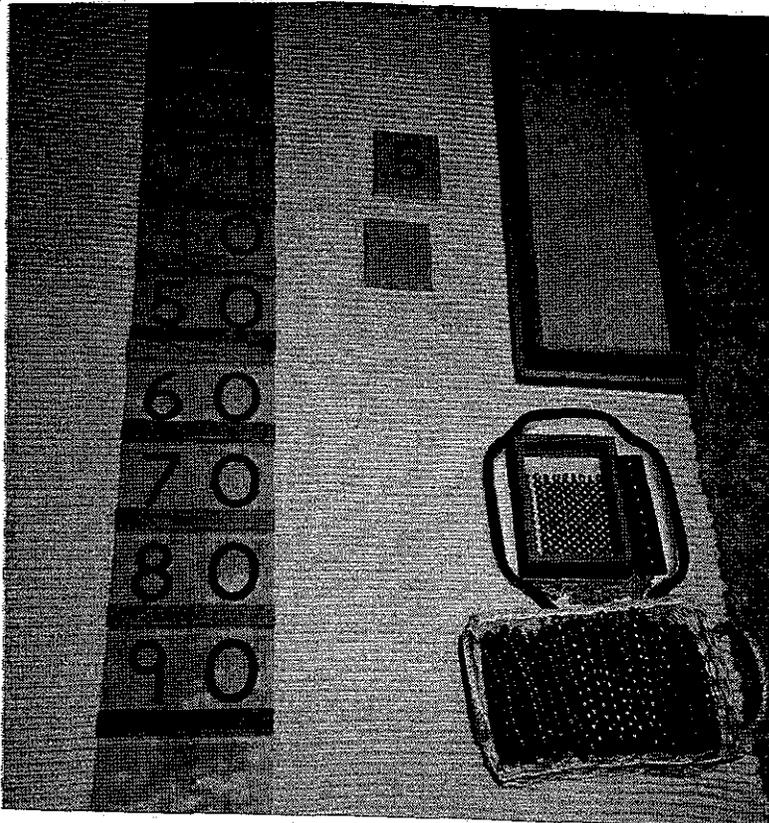


Ten Boards with Beads
Presentation One: Beads Only

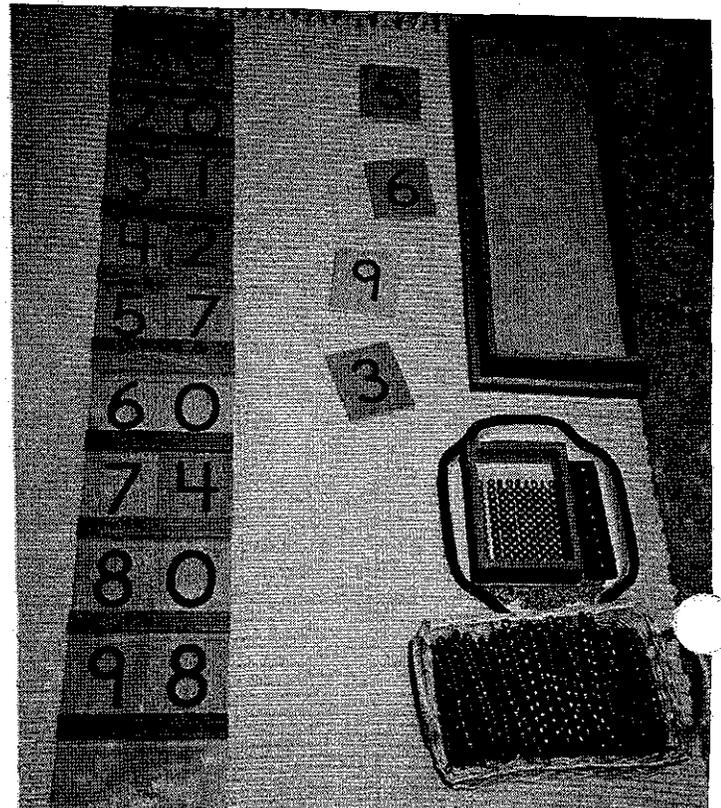


Mathematics II

Introduction to Teens and Tens



Ten Boards with Beads
Presentation Two: Symbols Only



TEEN BOARDS WITH BEADS (TEENS AND TENS)

MATERIAL:

- Box of ten bead bars
- Short Bead Stair
- Teen boards which are two long, narrow wooden boards, each divided into five sections by narrow wooden strips placed horizontally across the width. In nine of these sections, a large number 10 is printed on the board.
- A set of wooden tablets which slide into the sections on the board to cover the zero of the ten. On these tablets the symbols 1-9 are printed.
- Boards and tablet symbols are in a wooden box
- A rug

PRESENTATION 1: SYMBOLS ONLY

- Invite the child and name the material.
- Define the work space by inviting the child to bring a rug.
- Using only the teen boards, take them from the box and place box aside.
- Point to the first 10 saying, "What number is this?" (10)
- Continue down the board and discover with the child that they are all tens.
- Place wooden number card with 1 written on it next to the first 10 saying, "Ten and 1 make 11."
- Do the same with 2 and 3 sliding them into the 10 slot to make 12 and 13.
- Do a three period lesson.
- Continue in the same manner with the rest of the teen numbers.
- When completed, have the child practice counting forward and backwards 11 to 19 and 19 to 11.
- Return the materials when activity is completed.
- Invite the child to take a turn.
- **NOTE:** If the child is writing, encourage him/her to write the numbers.

Exercise 1: SYMBOLS AT RANDOM

- Take the wooden number cards from the teen boards and place in mixed array on the rug to the right of the boards.
- Invite the child to make numbers saying, "Can you make 13?", etc.
- Continue in the same manner until all the cards are used.

PRESENTATION 2: SYMBOL AND QUANTITY

- Line up the ten bead bars on the left of the teen boards in a vertical column.
- Arrange the Short Bead Stair on the right side with the number cards piled in correct sequence (one at the top, nine at the bottom).
- Say, "Ten and 1 make 11." Place the one bead bar next to the first bead of the ten bead bar and place the number card 1 into the top 10 slot of the board forming 11. **NOTE:** Always place beads first and then insert the number card.
- Invite the child to count out the beads as you place them for more practice counting.
- Continue in the same manner until completion.
- Return the materials when activity is completed.
- Invite the child to take a turn.
- **NOTE:** If the child is writing, encourage him/her to write the numbers.

Exercise 1: SYMBOL AND QUANTITY AT RANDOM

- After the child has worked with the material, mix up the beads and number cards and invite the child to arrange them from 11-19.
- Also, hand the child any bead bar from the Short Bead Stair and say, "What number can you make with this?" Child may make 14 saying "Ten and four make fourteen" with the beads and again with the symbols (Teen Boards)

DIRECT AIMS:

- Association of the symbol with quantities they signify
- Introduction to the name and sequence of the teen numbers

INDIRECT AIMS:

- Development of independence and concentration for figuring mathematical operations

POINTS OF INTEREST:

- The zero disappearing as the number card is inserted

CONTROL OF ERROR:

- One to one correspondence of number cards to slots

LANGUAGE:

- Numbers 11-19

AGE:

- 4.5 years of age and up

TEN BOARDS WITH BEADS (TEENS AND TENS)

MATERIAL:

- Two boards similar to the Teen Boards. On these boards, the numbers 10 to 90 are printed
- A set of wooden tablets which slide into the sections of the board to cover the zero, on which are printed numbers 1-9
- A box of 45 ten bead bars
- A box of 9 unit beads and 9 ten bead bars
- A rug

PRESENTATION 1: BEADS ONLY

- Invite the child and name the material.
- Define the work space by inviting the child to bring a rug.
- Place a ten bead bar out on the rug laterally and say, "This is 10."
- Take out 2 ten bead bars and place below the first and say, "This is 2 tens and it makes twenty."
- The child may want to count them out and s/he may do so.
- Continue on to thirty in the same manner.
- Do a three period lesson.
- Continue until 90 is reached and the box of ten bead bars is empty.
- Return the materials when activity is completed.
- Invite the child to take a turn.

Exercise 1: BEADS AT RANDOM

- Invite the child to make particular numbers with the beads.
- Ask, "Can you make 60?" and allow the child to compile the necessary number of ten bead bars by counting by tens out loud.
- Continue with all of the numbers 10 to 90 at random.

PRESENTATION 2: SYMBOLS ONLY

- Using the Ten Boards and number cards, place the ten boards out and look them over with the child.
- Point to each number and the name.
- If the child has any problem with some of the names, do a three period lesson on them.
- Take out the number cards and arrange in order.
- Begin by putting the card with 1 on it onto the first slot on the board (10) and saying, "Ten and 1 make 11."
- Take out the card and turn it face down on the rug.

- Continue with the second number in the same manner, "Ten and 2 make 12." Insert number card 2.
- Continue in the same manner to 19.
- Explain: "If I had one more, I would have twenty. Here we don't insert a card at all."
- Show the child how to turn the whole set of number cards right side up and begin again at 21 in the same manner.
- Continue to 99.
- Return the materials when activity is completed.
- Invite the child to take a turn.

Exercise 1: SYMBOLS AT RANDOM

- Scatter the number cards to the right of the the Ten Boards and ask the child to make a number.
- "Make the number 31, then 74, then 47" etc.
- Allow the child to make them one at a time and wait for him/her to insert the correct number card.
- Continue until all the number cards are used.
- Remove all the cards and remake the numbers.
- Invite the child to tell the name of the numbers made.

PRESENTATION 3: SYMBOLS AND BEADS COMBINED

- Line up the number cards 1 to 9 in sequence.
- Set up the 9 ten bead bars and the 9 unit beads by lining up the ten bead bars on the left side of the Ten Boards in a vertical column.
- Say "Ten and 1 make 11." and place 1 unit bead to the right side of and next to the first bead of the first ten bead bar.
- Insert the number card with 1 on it into the first 10 on the board to make 11.
- Get another unit bead and place it under the first one saying, "Ten and 2 make 12".
- As you put down the bead, invite the child to insert the card and then take it out for the next number.
- After 19, say to the child "If I had one more bead, I would have 10. Ten and 10 make 20."
- Move to 20. Turn over the set of number cards and move the ten bar down alongside the one near 20 so that you have 2 ten bars on the left of 20 on the Ten Boards.
- Proceed in the same manner until 99.
- Return the materials when activity is completed.
- Invite the child to take a turn.

Exercise 1: SYMBOLS AND BEADS AT RANDOM

- After much work with Presentation 3, make any number with the symbols and ask the child to find the corresponding beads or visa versa.
- Two children may engage in this work. One may make the numbers with beads and the other identify the corresponding symbol. Then they may switch positions.

DIRECT AIMS:

- Introduction to the name and sequence of the ten numbers
- Association of the symbol with quantities they signify

INDIRECT AIMS:

- Development of independence and concentration for figuring mathematical operations

POINTS OF INTEREST:

- The zero disappearing as the number card is inserted

CONTROL OF ERROR:

- One to one correspondence of number cards to slots

LANGUAGE:

- The names of the tens: twenty, thirty, forty, etc.

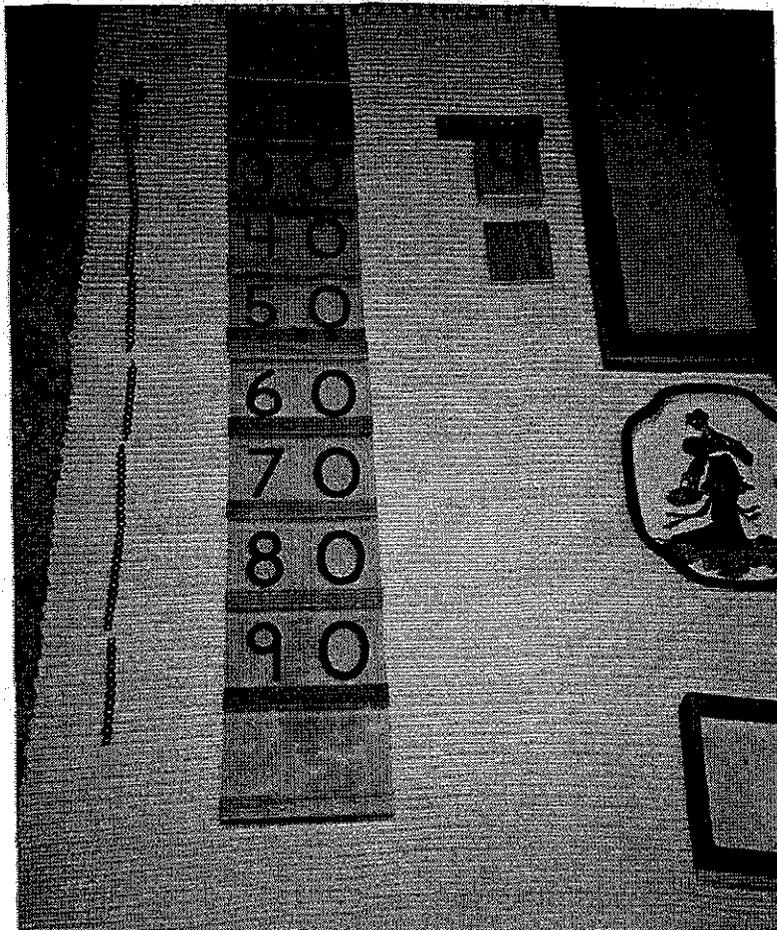
AGE:

- 4.5 years of age and up

Mathematics II

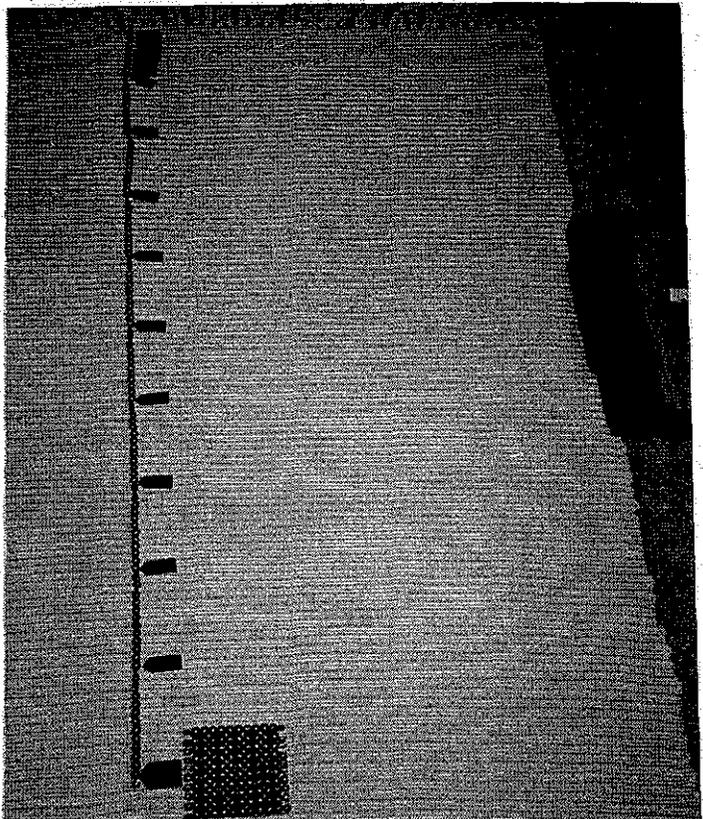
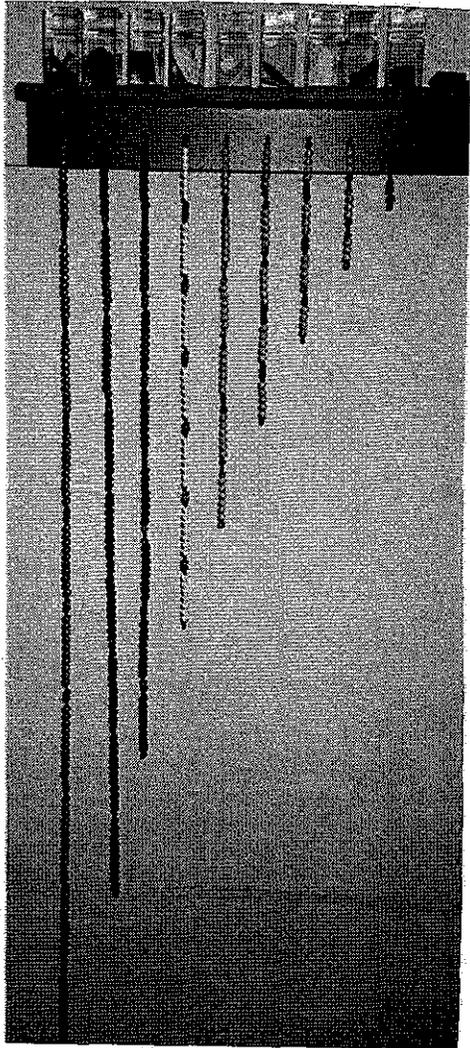
Introduction to Teens and Tens

Ten Boards with Beads Presentation Three: Symbols & Beads



Mathematics II
Introduction to Teens and Tens

**Linear Counting:
The Hundred Chain**



LINEAR COUNTING: THE HUNDRED CHAIN (TEENS AND TENS)

MATERIAL:

- The Hundred Chain (found in the Bead Cabinet)
- Container with green arrows printed 1 - 9, blue arrows printed with multiples of 10 (10 - 90), and one large red arrow with 100 printed on it (found in the Bead Cabinet)
- A tray
- One Hundred square (found in the Bead Cabinet)
- A counter
- A rug

PRESENTATION:

- Invite the child and name the material.
- Define the work space by inviting the child to bring a rug.
- Show the child how to carry the Hundred Chain close to his/her body in a horizontal position or to lay it carefully onto a tray to be carried to the rug
- Place the containers with arrows, the counter and the Hundred Square on the tray and bring to the rug.
- Fold up the chain and notice how it looks like the Hundred Square.
- Stretch out the chain and say, "Now we will count the chain."
- Before counting, have the child sort out the arrows and arrange them in rows.
- Begin counting, using the counter to touch the beads, the first beads of the chain and label them with the appropriate green arrows. At 10, put the blue arrow with 10 printed on it.
- Count 11 to 19 orally as you move the counter from bead to bead.
- At the twentieth bead, place the blue arrow printed with twenty printed on it.
- **NOTE:** Encourage the child to leave the counter at the correct bead to mark the place as s/he is getting to arrow.
- Have the child continue in the same manner to 99.
- Place emphasis on the 100th bead with use of the red arrow.
- Discuss with the child how many beads are on this chain (one hundred and that is a lot!) Tell the child that this is the same amount that is in the Hundred Square and that each bead has its own name!

Exercise 1: COUNTING BY TENS

- The child counts by tens only after s/he has worked with the material for some time.

Exercise 2: COUNTING AT RANDOM

- Give commands to the child to "Find on the chain 64 and place the arrow there.", etc. Repeat often.
- This activity entails counting by tens.
- Blank arrows may be used so that the child can find and fill in numbers at random.

DIRECT AIMS:

- Introduction to the sequence of numbers
- Introduction to counting by tens

INDIRECT AIMS:

- Development of independence and concentration for further mathematical operations

POINTS OF INTEREST:

- Placing the arrows at the appropriate beads
- Folding and unfolding the chain to see it form a hundred square

CONTROL OF ERROR:

- The Directress

LANGUAGE:

- The numbers 1 - 100

AGE:

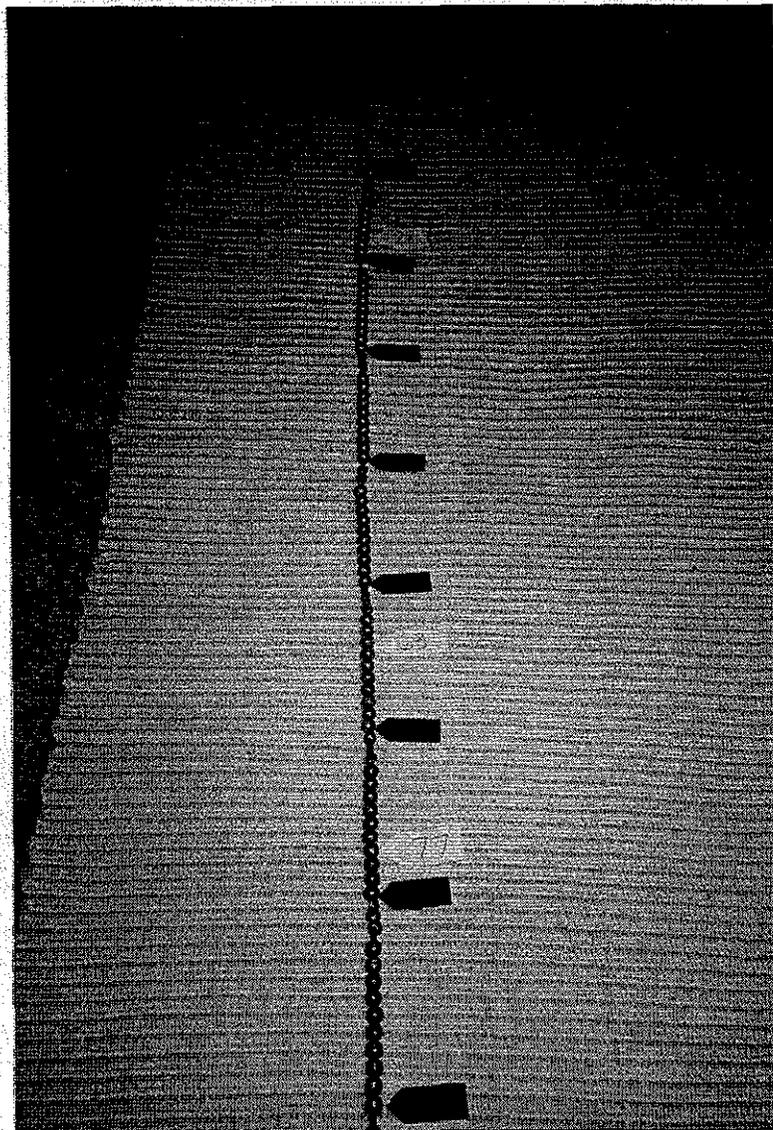
- 4.5 - 5 years of age and up

Mathematics II

Introduction to Teens and Tens

Linear Counting: the Hundred Chain

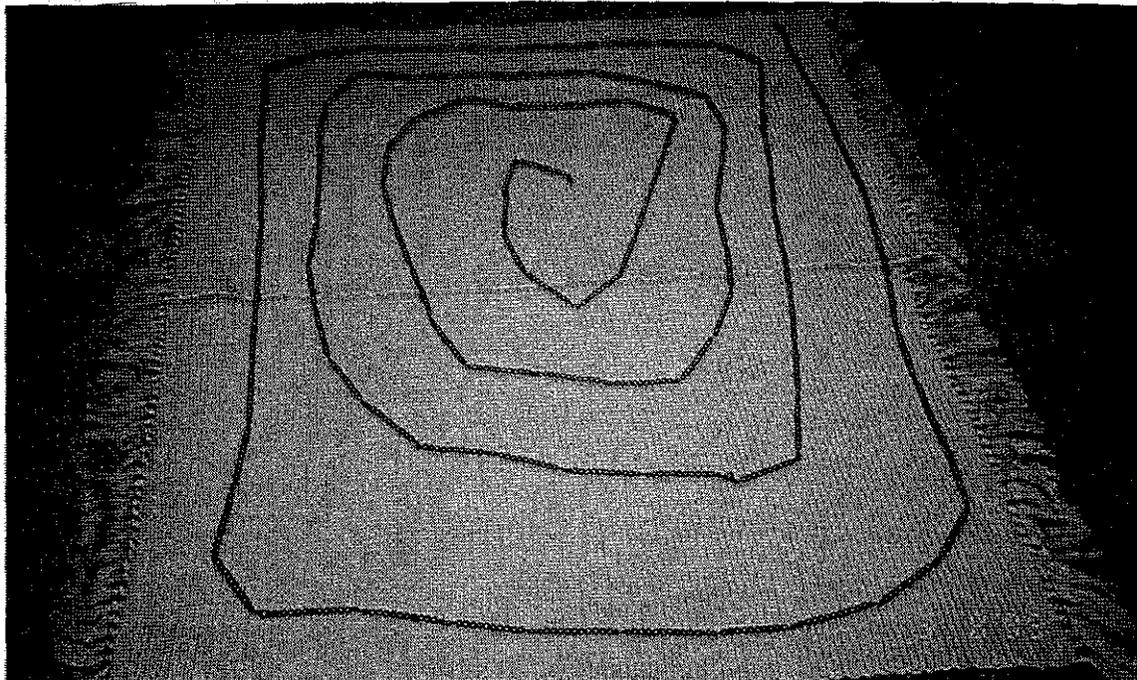
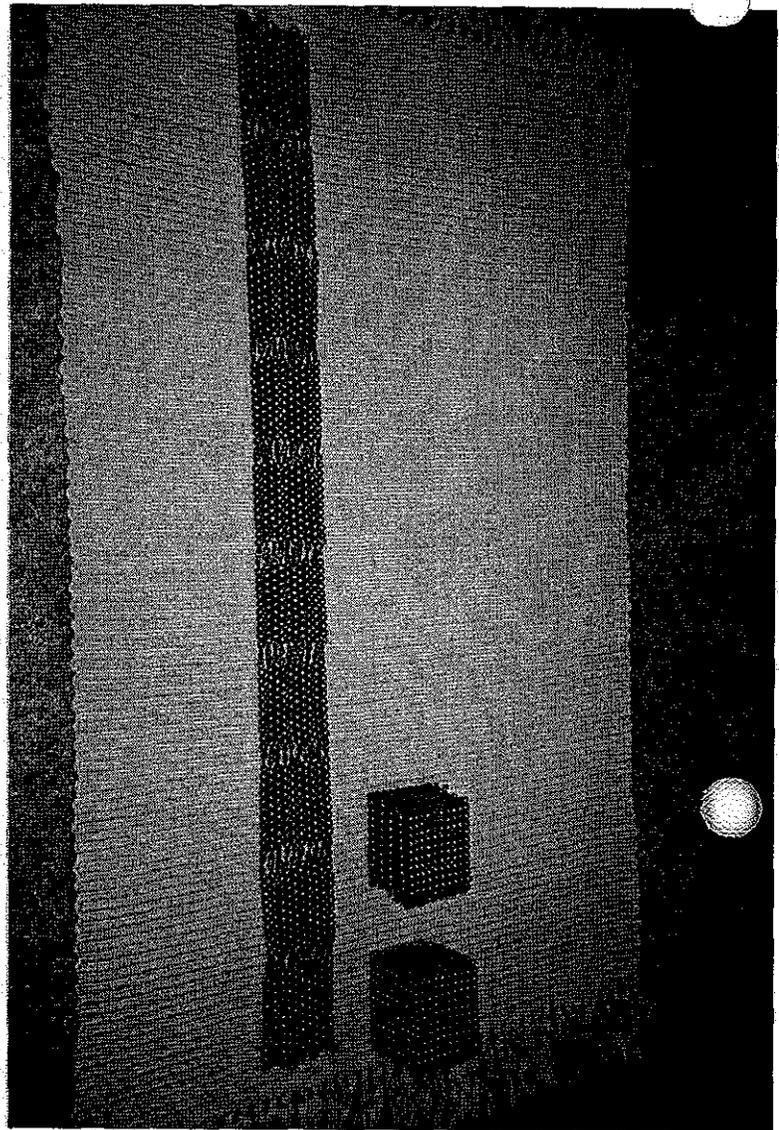
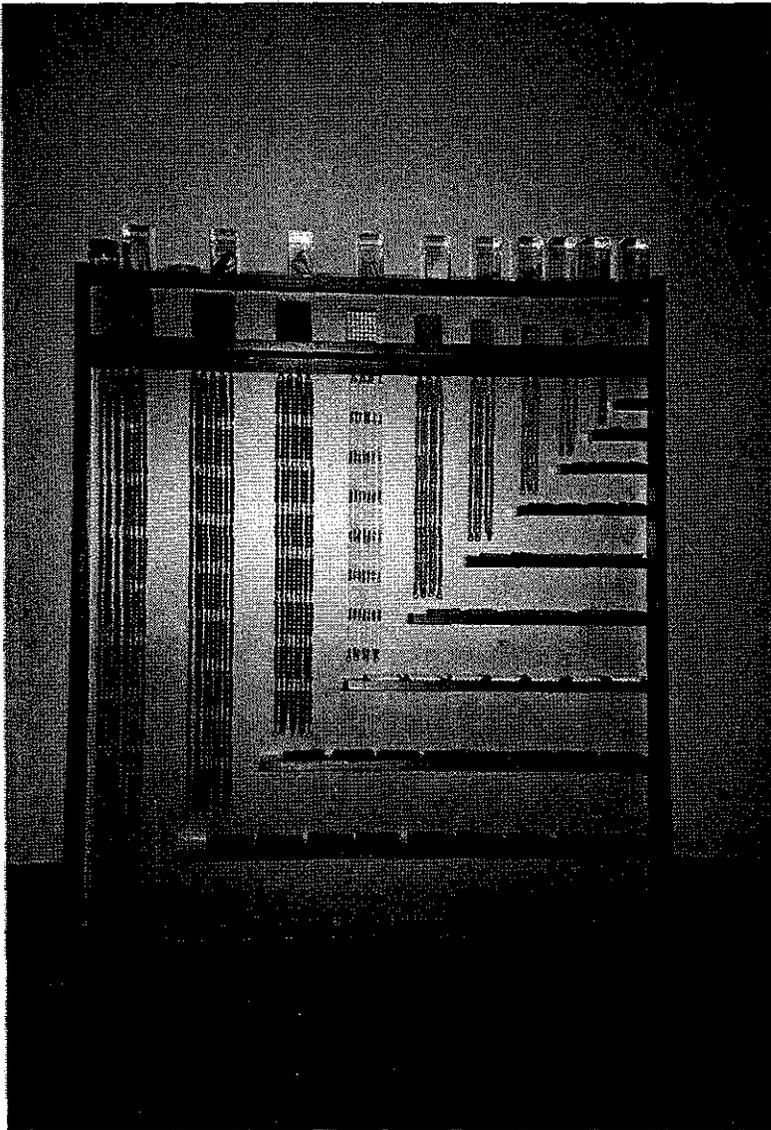
Exercise Two: Counting at Random



Mathematics II

Introduction to Teens and Tens

Linear Counting: The Thousand Chain



LINEAR COUNTING: THE THOUSAND CHAIN (TEENS AND TENS)

MATERIAL:

- The Thousand Chain (found in the Bead Cabinet)
- Container with green arrows printed 1 - 9, blue arrows printed with multiples of 10 (10 - 990), red arrows with 100 - 900 printed on them, and one green arrow with 1000 printed on it (found in the Bead Cabinet)
- The Thousand Cube (found in the Bead Cabinet)
- Nine hundred squares (found in the Bead Cabinet)
- A tray
- A counter
- Two or three rugs

PRESENTATION 1: COMPARING WITH CUBE AND SQUARES

- Invite a small (two to three) children and name the material.
- Define the work space by inviting a child to bring a rug.
- Show the children how to carry the Thousand Chain.
- Fold the chain at each hundred and make 10 hundred squares from it.
- Place the Thousand Cube beside it.
- Place 10 hundred squares under the Thousand Chain which is folded laterally.
- Place the hundred squares on top of each other and note the similarity to the Thousand Cube. (This gives concrete proof that 10 hundreds make one thousand)
- When completed, show child how to put away the chain picking up and folding the chain at each hundred loop.
- Invite the children to take a turn.

PRESENTATION 2: COUNTING WITH ARROWS

- Invite a small (two to three) children and name the material.
- Define the work space by inviting a child to bring two rugs.
- Show the children how to carry the Thousand Chain.
- Ask the children to sort out the arrows into their correct groupings on a separate rug.
- Begin placing arrows on the left side of the chain as the beads are counted with the counter.
- Make sure that the point of the arrow is directly opposite the correct bead.
- The children may take turns counting as each bead on the chain and placing the arrows where appropriate. **NOTE:** Arrange the arrows on the tray and bring to appropriate

- place on the chain where counting is taking place. They may be brought in groups of ten.
- When counting is complete, place the Thousand Cube at the end of the chain.
 - Place the nine hundred squares one beside each of the hundreds.
 - When completed, show child how to put away the chain by collecting the arrows first and then picking up and folding the chain at each hundred loop.
 - Invite the children to take a turn.

Exercise 1: COUNTING AT RANDOM

- Use a set of extra blank arrows and ask the child to find any number at random (483, 269, 785, etc.)

DIRECT AIMS:

- Introduction to the sequence of numbers
- Introduction to counting by hundreds

INDIRECT AIMS:

- Development of independence and concentration for further mathematical operations

POINTS OF INTEREST:

- Placing the arrows at the appropriate beads
- Folding and unfolding the chain to see it form a thousand cube

CONTROL OF ERROR:

- The Directress

LANGUAGE:

- The numbers 1 - 1000

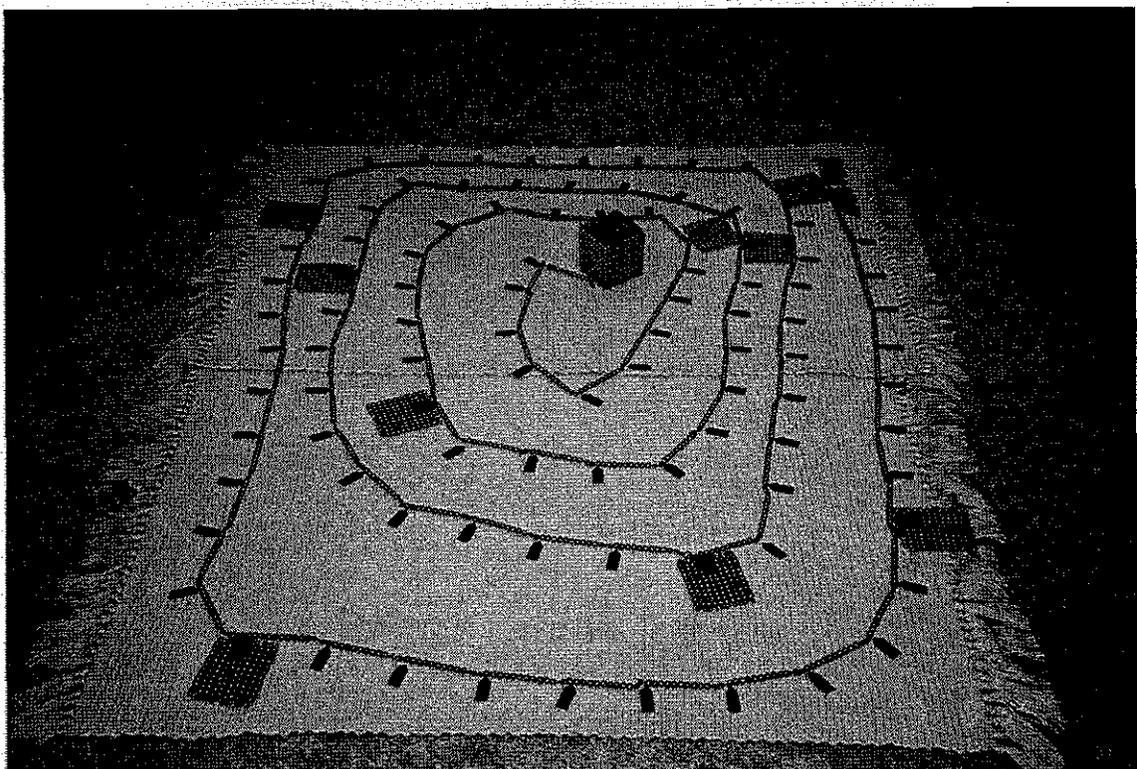
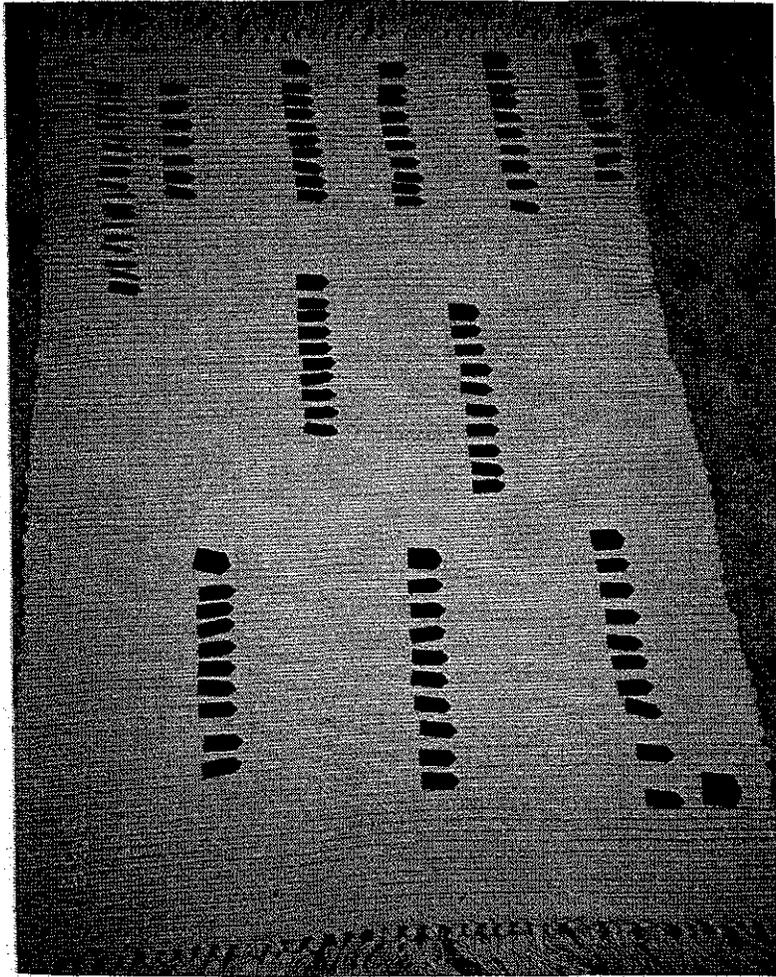
AGE:

- 4.5 - 5 years of age and up

Mathematics II

Introduction to Teens and Tens

Linear Counting: The Thousand Chain Presentation Two: Counting with Arrows



Mathematics II

Introduction to Teens and Tens

Skip Counting: Square
Presentation One: Square Chain of Five



SKIP COUNTING: SQUARE (TEENS AND TENS)

MATERIAL:

- The chain of the square of five
- The arrows for the chain of the square of five
- The bead square of five
- Tray
- A rug

PRESENTATION 1: THE SQUARE CHAIN OF FIVE

- Invite the child and name the material.
- Define the work space by inviting the child to bring a rug.
- Show the child how to bring the chain of the square of five to the rug.
- Sort out the arrows in order 1,2,3,4,5, 10,15,20,25 in a vertical column.
- Fold up the chain of the square of five so that it looks like the square of five.
- Put the bead square of five on top of the folded chain. Observe. Remove.
- Open out the chain laying it vertical on the rug.
- Count the first five beads and label with the arrows.
- Say "Five and five are ten" and label with this arrow, "Ten and five are fifteen" and label.
- Continue in the same manner to twenty five.
- Little by little move the child away from sequential counting and towards skip counting or multiplication.
- Remove the arrows and invite the child to repeat the process counting by fives.
- When completed, show child how to put away the chain by collecting the arrows first and then picking up and the chain.
- Invite the children to take a turn.

PRESENTATION 2: THE SQUARE CHAINS OF ONE THROUGH TEN

- Repeat Presentation 1 with any of the square chains of one through ten and the corresponding arrows.

DIRECT AIMS:

- Introduction to skip counting of numbers

INDIRECT AIMS:

- Preparation for multiplication and the squaring of numbers

- Development of independence and concentration for further mathematical work

POINTS OF INTEREST:

- The square chains themselves

CONTROL OF ERROR:

- The Directress

LANGUAGE:

- The numbers

AGE:

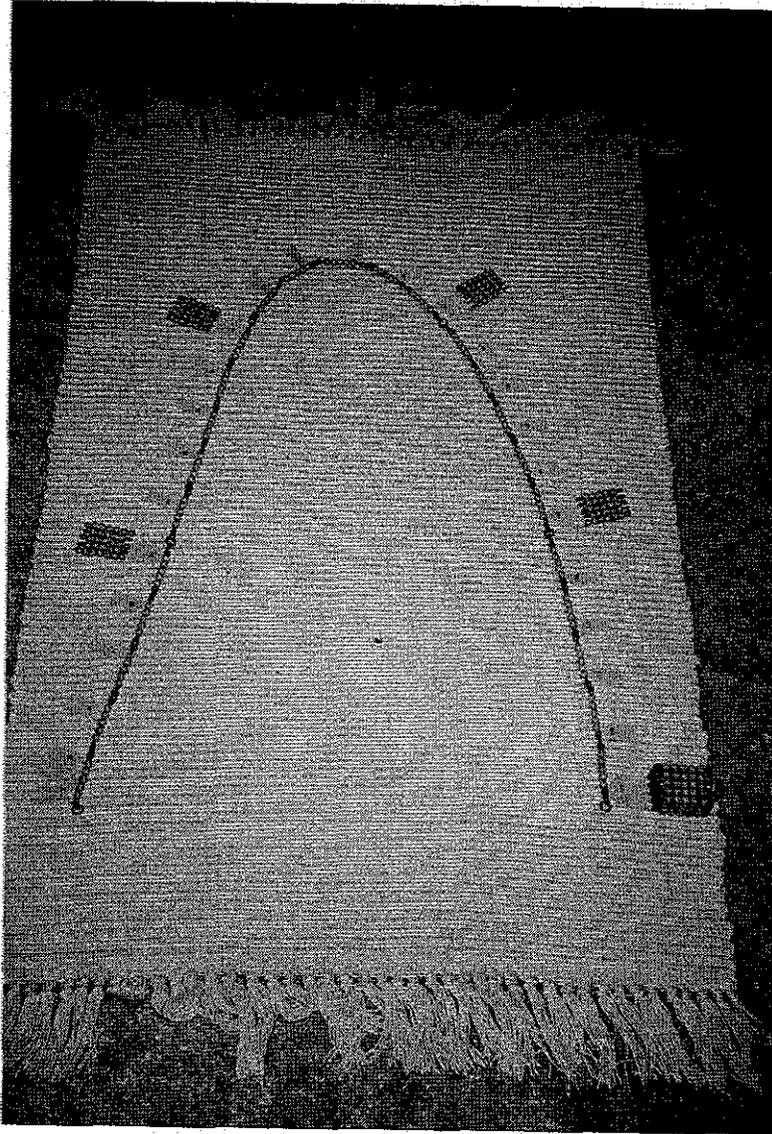
- 5 to 5.5 years of age and up

Mathematics II

Introduction to Teens and Tens

Skip Counting: Cube

Presentation One: Cube Chain of Five



SKIP COUNTING: CUBE (TEENS AND TENS)

MATERIAL:

- The chain of the cube of five
- The arrows for the chain of the cube of five
- The bead cube of five
- The five bead squares of five
- Tray
- A rug

PRESENTATION 1: THE CUBE CHAIN OF FIVE

- Invite the child and name the material.
- Define the work space by inviting the child to bring a rug.
- Show the child how to bring the chain of the cube of five to the rug.
- Fold the chain into five rows to form five squares of five.
- Lay out the five bead squares of five underneath these and then superimpose them.
- Stack the bead squares and compare with the cube of five.
- Count out the squares that make up this cube: 5. (Gives the child a Sensorial impression of what a cube is.)
- Lay out the chain of the cube of five again.
- Sort out the arrows in order 1,2,3,4,5, 10,15,20,25, ...125 in a vertical column.
- Invite the child to count 1 through 5 labeling each bead with an arrow.
- Say, "Five and five are 10" and label this.
- Continue in the same manner to 125.
- Show the child to place the square beads of five along the left side of the chain to denote the squares at beads 25, 50, 75, and 100. "One square equals 25, two squares of 5 is 50, three squares of 5 is 75, etc."
- When completed, show child how to put away the chain by collecting the arrows first and then picking up and the chain.
- Invite the child to take a turn.

PRESENTATION 2: THE CUBE CHAINS OF ONE THROUGH TEN

- Repeat Presentation 1 with any of the square chains of one through ten and the corresponding arrows.

DIRECT AIMS:

- Refinement of skip counting

INDIRECT AIMS:

- Preparation for multiplication and the cubing of numbers
- Development of independence and concentration for further mathematical work

POINTS OF INTEREST:

- The cube chains themselves

CONTROL OF ERROR:

- The Directress

LANGUAGE:

- The numbers

AGE:

- 6 years of age and up

HUNDRED BOARD (INTRODUCTION TO TEENS AND TENS)

MATERIAL:

- A wooden board of one hundred blue squares: ten squares across the top and ten squares down
- One hundred individually numbered square tablets printed with numbers 1 - 100 in a box (use colored paper to separate 1-25, 26-50, 51-75, 76-100)
- Control Chart with numbers 1 - 100 printed in it in rows of tens such that 1 is at the top left corner and 100 at the bottom right corner
- A mat and a rug

PRESENTATION:

- Invite the child and name the material.
- Define the work space by inviting the child to bring a rug and mat.
- Place blue hundred board at center of the rug.
- Lay out mat vertically to left of hundred board.
- Take out tablets 1 -25 from the box and place on the mat in mixed array rows of single digits, teens, twenties..
- Show the child how to find and place the tablets on the board counting aloud as you go, "One, two, three, where's four, oh there, five, six, etc."
- Invite the child to find the next needed number and place it on the board.
- Continue in the same manner to 25.
- Bring out the next set of numbers (26 - 50) and proceed in the same manner. (You may show the child how to organize the numbered tablets into rows such as all the thirties, all the forties, etc. for ease in locating the next tablet in the sequence.)
- Repeat for all numbers to 100.
- When completed, use the Control Chart to check the board for accuracy.
- **NOTE:** Encourage the child to record or write the numbers on paper or chalkboard.
- Return the materials when activity is completed.
- Invite the child to take a turn.

DIRECT AIMS:

- Reinforcement of symbol memorization for numbers 1 - 100 in sequence

INDIRECT AIMS:

- Development of independence and concentration for further mathematical operations

POINTS OF INTEREST:

- Placing the 100 tablet!

CONTROL OF ERROR:

- Control Chart
- One to one correspondence with exact number of tablets as squares on the board

LANGUAGE:

- Numbers 1 - 100

AGE:

- 4.5 - 5 years of age and up

Weekly Work Plan

Name _____

Date _____

Mon.

Tues.

Wed.

Thur.

Fri.

LANGUAGE

 SRA					
 Reading					
 Grammar					
 Reading Analysis					
 Punctuation					
 Phonogram					
 Spelling					
 Word Study					
 Writing/Research					
 Handwriting					

MATH

 Math Operations					
 Math Facts					
 Chains					
 Math Drill					
 Fractions					
 Money					
 Geometry					

CULTURAL STUDIES

 Geography					
 History					
 Botany					
 Zoology					
 Science					
 Time/Clock					
 Art/Computer					
 Music/Spanish					

FREE CHOICE

					
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Individual Learning Plan

Student _____ Teachers _____ YEAR _____

Date of First Conference _____ Date of Second Conference _____

OUTCOMES	PARENT INPUT	TEACHER INPUT	GOALS	PROGRESS TOWARDS GOAL
Academic Abilities and Critical Thinking Skills	See attached			
Confidence/ Positive Self-Image	See attached			
Independence/ Competence (Autonomy)	See attached			
Intrinsic motivation	See attached			

Individual Learning Plan

Student _____ Teachers _____ YEAR _____

Date of First Conference _____ Date of Second Conference _____

OUTCOMES	PARENT INPUT	TEACHER INPUT	GOALS	PROGRESS TOWARDS GOAL
Academic Abilities and Critical Thinking Skills	See attached			
Confidence/ Positive Self-Image	See attached			
Independence/ Competence (Autonomy)	See attached			
Intrinsic motivation	See attached			

Individual Learning Plan

Student _____ Teachers _____ YEAR _____

Date of First Conference _____ Date of Second Conference _____

OUTCOMES	PARENT INPUT	TEACHER INPUT	GOALS	PROGRESS TOWARDS GOAL
Academic Abilities and Critical Thinking Skills	See attached			
Confidence/ Positive Self-Image	See attached			
Independence/ Competence (Autonomy)	See attached			
Intrinsic motivation	See attached			

Curriculum 6-9 Class: Cultural Studies

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June
Zoology	Lev.1 Classification Games Living/Nonliving Plant/Animal Five Kingdoms	External Parts of Fish Research and Story writing	External Parts of Amphibians Research and Story writing	External parts of Reptiles Research and Story writing	External parts of birds Research and Story writing	External parts of Mammals Research and Story writing	Animal Stories	Animal Stories	Animal Stories	Animal Stories
	Lev. 2 Animal Stories	Animal Stories	Animal Questions	Animal Questions	Animal Questions	One Animal, Many questions	Animal Research	Animal Research	Animal Research	Animal Research
	Lev.3 Animal Classification Chart Classification Games	Main characteristics of Fish	Main characteristics of Amphibians	Main characteristics of Reptiles	Main characteristics of Birds	Main characteristics of Mammals	Main characteristics of mammals	Invertebrates?	Invertebrates	Invertebrates?
Botany	Lev.1 Classification Games Living/Nonliving Plant or Animal Five Kingdoms	Five Kingdoms Chart Parts of a Plant	Five Kingdoms Chart Parts or Kinds of Stems	Parts of a leaf	Leaf shapes and Veins	Leaf Shapes	Parts of a Flower	Kinds-of Fruit	Parts of a seed	Trees?
	Lev. 2 Classification Games Classified Nomenclature Parts of a Plant	Classified Nomenclature: Roots	Classified Nomenclature: Roots	Classified Nomenclature: Roots	Classified Nomenclature: Roots	Classified Nomenclature: Roots	Plant Stories Plant Questions	Plant Stories Plant Questions	Plant Stories Plant Questions	Plant Stories Plant Questions
	Lev.3 classification Games Plant Classification Chart	Plant Stories Plant Questions	Plant Stories Plant Questions	Plant Stories Plant Questions	Plant Stories Plant Questions	Plant Stories Written Research	Written Research	Written research	Written Research	Written research
History	Lev.1 Marking Time- unequal/equal Robinson Crusoe	Personal Timeline Family Timeline Birthday Timeline	Days of the Week Months Calendars Holidays	BCE/CE Timeline with Golden Beads Clock: Hour Clock: half hour	History and Grammar Line games Long Black Line	People Vertical and Horizontal Needs of People	Creation Story Clock of Eras	Timeline of Life	Timeline of Life	Timeline of Life
	Lev. 2 Robinson Crusoe Journals	Autobiography Year and its Parts	Spelling and Abbreviations of Days and months Gathering data	Centuries on BCE/CE timeline Clock-quarter hour	Verb Kit- Simple tenses Long black Line	Make Needs of people chart Cards and Stories son timeline	Creation Story Clock of Eras research questions Cards on timeline	Timeline of Life- Research Make timeline	Timeline of Life- Research Make timeline	Timeline of Life- Research Make timeline
	Lev. 3 Robinson Crusoe Journals	Autobiography May give lesson on Year and its parts	Writing paragraphs Months and Holiday Research	Centuries on BCE/CE timeline Roman Numerals Clock-5 minutes	Verb Kit Write story of Long Black Line	make chart of Needs of People, write a paragraph on needs in a period	Creation Story Clock of Eras Research Classic of Eras project	Specific Research on Timeline of life by periods	Specific Research on Timeline of Life by periods	Specific Research on Timeline of Life by periods

Curriculum 6-9 Class: Geometry

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June
	Lev. 1 Geometric Solids	Geo. Cab. Polygons Geo. Cab. Quadrilaterals	Geo. Cab. Curved Figures	Geo. Cab. Triangles	Basic Concepts-Solid	Basic Concepts: Plane	Basic Concepts: Line and Point	Basic Concepts: Point Line & Solid	Golden Beads	Nomenclature Cards
	Lev. 2 Study of the Line: Geo. Cabinet	Study of the Line: Lines Study of Line: Parts of Line	Study of the Line: Relationship of Lines to the Earth Lessons 1 & 2	Study of the Line: Relationship between Two Lines	Study of Angles: An Angle, Parts of an Angle Angles: Principle Angles	Measurement of Angles: The Sumerians	Measurement of Angles: Triangles	Measurement of Circles	Measurement of Other Figures	
	Lev. 3 Study of Figures Study of Figures: Polygons Study of Figures: Closed Figures	Study of Triangles: Parts Study of Triangle: Sides Study of Triangles: Angles Study of Triangle: Sides and Angles	Study of Triangles: Acute Triangles Study of Triangle: Obtuse Triangles Study of Triangles: Right Triangles	Study of Triangle: Length of Sides Study of Triangles: Construction of Isosceles Study of Triangle: Parts of Right Triangles	Study of Quadrilaterals: Intro. Study of Quadrilaterals: Constructions Study of Quads: Common Quadrilaterals	Study of Quadrilaterals: Trapezoid Study of Quadrilaterals: Parallelogram Study of Quads: Rectangle	Study of Quadrilaterals: Rhombus Study of Quadrilaterals: Square Study of Quads:	Study of Polygons: Parts & Types of a Trapezoid Study of Polygons: Types Study of Polygons: Equilateral, Triangle & Square Rectangle	Study of Polygons: Regular Study of Circles: Parts Study of Circles: Relationship B/W Circle Straight Line Study of Circles: Relationship b/w two Circles	Study of Equality, Similarity and Equivalence: Triangle Box, Small Hexagonal Box, Large Hexagonal Box

Updates to the RMCS Budget for Sonoma County Board of Education, November 10, 2008

1. Governor signed state budget September 23, 2008 for 2008-09, with final per ADA amounts for the Lower Elementary Charter Block Grant, Upper Elementary Charter Block Grant, Charter School Categorical Grant, Lower Elementary Class Size Reduction, and California Lottery, which all varied from our original estimates as submitted to OAUSD. For the first four grants, the signed budget amounts were slightly higher than our estimates, while for the latter (the lottery) the signed budget amount was slightly lower than our estimate.
2. The California Department of Education verified in September 2008 that the Charter School Planning & Implementation Grant, thereby nearly guaranteeing that RMCS will receive the full maximum amount of \$600,000 for which it will be eligible. Still to be cautious, we have only assumed a grant of \$500,000 for our budget, including \$210,000 in the start-up period, \$170,000 in year one, and \$120,000 in year two.
3. RMCS will apply to the Sonoma SELPA to be a Local Educational Agency (LEA) for purposes of special education, whereas it had petitioned to OAUSD to be a school within the district for special education. On the revenue side, being an LEA will mean that federal and state AB602 funds will be allocated directly to RMCS based on the SELPA's per ADA and per pupil 50-50 allocation plan, as well as additional revenue for any students with higher intensity needs. We have estimated this revenue based on the Sonoma County average of IEP students for grades 1-4 (1-6 by year three). The AB602 funds will only be spent on special education expenses.

On the expense side, RMCS will pay directly for staffing of services, including hiring of a Resource Specialist, most likely part-time in years one and two, and, if necessary, any full inclusion aides. Other services will be provided by non-hired contractors or from a school district, including Speech Language Pathologist, Psychologist, Occupational Therapist, if needed, Physical Therapist, if needed, and any other services. We have estimated the cost for all of these services, based on the costs of a similar school that is an LEA, Sebastopol Independent Charter School (SICS).

RMCS will also create a special education reserve fund by setting aside two percent of our total state grant revenue each year for this fund. This will cover any necessary private school placements and/or litigation. In its first ten years SICS has not had any private school placements or litigation. As an LEA, RMCS should not be obligated to pay SCOE any special education encroachment, thus eliminating that line item expense.

Under the OAUSD budget, RMCS had an estimated net cost of \$33,250 for special education encroachment (which the District said was too low at the time of its vote). Under this updated budget submitted to SCOE, RMCS has an estimated net cost of \$36,859, including the 2% reserve fund. Thus the special education net costs are expected to be similar to what was in the budget submitted to the District.

4. RMCS received the workers compensation, commercial liability and property insurance rates from RESIG in early October 2008. Updated expense amounts for these items are included in this budget, in both cases at lower rates than our original estimates.

(Note: This budget will need to be updated further upon securing a school site. Most lease rates are between \$1.25 per sf and \$1.50 per sf in the area we are looking, with \$1.50 per sf the amount we use in our budget. The actual square feet may also vary. There also may be build out costs for non-permanent wall construction. This cost will be paid through the charter school revolving loan fund and the expense capitalized over the life of the lease.)

Updated Appendix I: Projected Students by Grade & Staffing

RMCS Projected Attendance, Number of Classrooms and Teachers, and Staffing Detail

Number of Students by Grade

	2009-10	2010-11	2011-12
1st grade	35	34	34
2nd grade	30	34	33
3rd grade	25	29	33
4th grade	10	24	28
5th grade	0	9	22
6th grade	0	0	8
Total	100	130	158

Note: Number of students per grade does not indicate number of students per classroom since RMCS will have combined, multi-grade classrooms.

Renewal rate of 96% for those entering 2nd-4th grades; renewal rate of 92% for those entering 5th-6th grades

Summary of Classes/Teachers by Program Level

	2009-10	2010-11	2011-12
Lower Elementary (combined 1-3 classrooms)	4	5	5
Upper Elementary (combined 4-6 classrooms)	¹ 1	2	3

¹ Ten 3rd graders and 10 4th graders would be in a 3-4 classroom

Student:Teacher Ratios by Program Level

	2009-10	2010-11	2011-12
Lower Elementary	20:1	19.4:1	20:1
Upper Elementary	20:1	16.5:1	19.3:1

Staffing Levels

	2009-10	2010-11	2011-12
Core Teachers	5	7	8
Resource Specialist	0.6	0.8	1
Speech Pathologist/Psychologist	80 hours	104 hours	126.4 hours
PE/Music/ Art ²	0.4	0.6	0.7
Head of School	1	1	1
Office Mgr/Admin. Assistant	1	1	2
Total Staff	8	10.4	12.7

² Several part-time PE, music, and art teachers combining to provide between 40% and 70% of one full-time equivalent teacher.

Note: Figures in red have been updated since the OAUSD petition submission.

Updated Appendix M, Budget Documents

**River Montessori Charter School
Start-Up Budget (January 2009 to June 2009)**

Revenue	Low	High	ASSUMPTIONS
Donations	\$ 12,000	\$ 20,000	Cash in hand
CDE Charter Planning & Implementation Grant	\$ 210,000	\$ 250,000	RMCS will apply for \$600,000 federally-funded Charter School Planning & Implementation grant upon approval. Highly likely to receive all or portion of P&I grant about 5 weeks after approval. While total grant will vary from \$500,000 to \$600,000, start-up amount will vary from \$210,000 to \$250,000
Total Revenue	\$ 222,000	\$ 270,000	
Start-Up Costs			
Salaries and Consultants			
Hire Ex. Director early	\$ 18,750	\$ 25,000	by March 1 (if full grant received) or April 1
Benefits	\$ 3,561	\$ 4,748	See Year 1-3 Assumptions
Accounting/Finance Consultant	\$ 1,000	\$ 2,825	Set up accounting & finance
Legal Consultant	\$ 6,000	\$ 7,000	Site; Board policies; Special Ed plan
Site & Facilities Expenses			
Lease - Facility	\$ 27,000	\$ 36,000	3 or 4 months rent
Liability / Property Insurance	\$ 1,000	\$ 1,500	
Marketing / Advertising			
Advertising for Teacher Recruitment	\$ 1,500	\$ 1,743	
Postage	\$ 100	\$ 120	
Printing	\$ 1,500	\$ 1,800	Brochures for student recruitment
Equipment, Furniture & Library			
Library Expansion	\$ 20,000	\$ 47,000	\$4,000 to \$9,400 per classroom
Montessori Materials	\$ 40,000	\$ 90,000	\$8,000 to \$18,000 per classroom
New Classroom Furniture	\$ 36,825	\$ 40,000	\$7,365 to \$8,000 per classroom
Total Start-up Costs	\$ 157,236	\$ 257,736	
Net Operating	\$ 64,764	\$ 12,264	
Non-operating changes to Cashflow			
Security Deposit, one month's lease	\$ (9,000)	\$ (9,000)	
End-of-start-up cashflow	\$ 55,764	\$ 3,264	Carries over into Cash-flow projection

Note: Figures in red have been updated since the OAUSD petition submission.

RMCS Building Detail

Number of Rooms

	<u>2009-10</u>	<u>2010-11</u>	<u>2011-12</u>
Classrooms (approx. 900 sf)	5	7	8
Office (approx. 500 sf)	2	2	3
Bathrooms	3	3	3
Storage (approx. 500 sf)			

Square Footage and Monthly Lease / NNN

	<u>2009-10</u>	<u>2010-11</u>	<u>2011-12</u>
Square Feet, estimate	6,000	7,800	9,000
Unit Cost per sf, estimate	\$ 1.50	\$ 1.53	\$ 1.56
Cost, per month	\$ 9,000	\$ 11,934	\$ 14,045

RMCS Special Education Estimated Revenue and Expenses (as LEA)

<u>Revenue</u>	2009-10	2010-11	2011-12	
Non-SH Pupil Count (ADA) Rate	\$ 156.67	\$ 159.81	\$ 163.00	Based on Sonoma SELPA; increased by COLA
Non-SH Pupil Count (ADA)	95	123.5	150.1	
Non-SH ADA Revenue	\$ 14,884	\$ 19,736	\$ 24,467	
IEP per pupil rate	\$ 1,366	\$ 1,393.10	\$ 1,420.96	Based on Sonoma SELPA; increased by COLA
Estimated IEP's	12.2	16.2	20.0	Based on county rate of IEPs per 100 students (12.2% to 12.7%)
IEP per pupil Revenue	\$ 16,613	\$ 22,557	\$ 28,455	
Total Revenue expected	\$ 31,496	\$ 42,293	\$ 52,922	

Expenses

On-staff resource teacher

Salary	28,800	39,168	49,939	Same as core teacher rate, \$48,000, 60% in yr. 1; 80% in yr. 2; 100% in yr. 3. Could be more or less depending on need.
Estimated Benefits	6,470	9,070	12,169	
Prof dev and other costs	1,310	1,336	1,363	
TOTAL staff costs	36,580	49,574	63,471	Same as core teachers
Speech and Language	5,700	7,410	9,010	\$100 per hour; estimated 57 hours in yr. 1; 73 hrs in yr 2; 88 hrs in yr 3.
Psych Testing	4,900	6,500	8,000	About \$400 per IEP
Occupational/Phys. Therapists	2,000	2,600	3,200	\$100 per child per session; estimated 20 sessions in yr. 1
Contingency	950	1,240	1,500	
Total expected expenses	50,130	67,324	85,181	
Estimated encroachment on school general funds	18,634	25,031	32,259	

IMPORTANT NOTE: School will keep 2% additional reserves for unexpected special education expenses (over and above general fund encroachment)

Special Ed Reserve	\$ 18,225	\$ 21,668	\$ 23,544
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Note: Actual revenue and expenses may vary from these estimates based on student population needs. Estimates based on comparable school, Sebastopol Independent Charter School; an LEA. Other staff and consultants will be hired, such as full-inclusion aides, as needed. More revenue is also provided for full-inclusion aides.

River Montessori Charter School, Three-Year Operating Budget

Revenue	<u>2009-10</u>	<u>2010-11</u>	<u>2011-12</u>
Block Grant, Lower Elem.	\$ 492,300	\$ 541,202	\$ 569,099
Block Grant, Upper Elem.	\$ 55,514	\$ 186,860	\$ 334,989
Categorical Grant	\$ 50,160	\$ 67,816	\$ 82,423
CA Class Size Reduction, Lower El.	\$ 91,571	\$ 100,667	\$ 105,855
CA Lottery	\$ 13,015	\$ 17,258	\$ 21,394
Economic Impact Aid - minimal floor-	\$ 5,864	\$ 5,981	\$ 9,206
Charter School Planning & Implementation Grant-	\$ 170,000	\$ 120,000	\$ -
Interest from Reserve Fund-	\$ 1,325	\$ 1,325	\$ 1,325
AB 602 Special Ed Funds from State/Federal-	\$ 31,496	\$ 42,293	\$ 52,922
Total	\$ 911,245	\$ 1,083,403	\$ 1,177,214
	<u>2008-09</u>	<u>2009-10</u>	<u>2010-11</u>
Expenses			
Salaries			
Core Teachers	\$ 240,000	\$ 332,800	\$ 386,656
Resource Specialist	\$ 28,800	\$ 39,168	\$ 49,939
Speech Pathologist/Psychologist/Occ-Phys Therapist	\$ 12,600	\$ 16,510	\$ 20,210
Substitutes	\$ 5,700	\$ 8,140	\$ 9,488
P.E. / Music / Art	\$ 16,800	\$ 25,704	\$ 30,588
Principal/Ex. Dir.	\$ 75,000	\$ 76,500	\$ 78,030
Office Manager	\$ 34,000	\$ 34,680	\$ 35,374
Receptionist/Admin Assistant	\$ -	\$ -	\$ 24,480
Total, Salaries	\$ 412,900	\$ 533,502	\$ 634,765
Benefits			
Health/Vision/Dental	\$ 44,425	\$ 61,167	\$ 80,562
State Teachers Retirement System	\$ 28,834	\$ 37,670	\$ 43,239
FICA (Federal Social Security)	\$ 3,150	\$ 3,744	\$ 5,607
Medicare	\$ 5,804	\$ 7,496	\$ 8,911
Unemployment Insurance	\$ 2,002	\$ 2,585	\$ 3,073
Other Retirement	\$ 612	\$ 624	\$ 1,077
Workers Comp	\$ 7,935	\$ 10,255	\$ 12,211
Total Benefits	\$ 92,761	\$ 123,541	\$ 154,681
<i>Benefits as percentage of salaries</i>	<i>22%</i>	<i>23%</i>	<i>24%</i>
Books & Supplies			
Instructional Supplies (includes tests)	\$ 2,500	\$ 60,000	\$ 4,000
Library	\$ 500	\$ 700	\$ 800
Music, Art, P.E. and other classroom equip./supp	\$ 9,000	\$ -	\$ -
Services & Other Operating Expenses			
Bookkeeper/Accounting/Payroll Services	\$ 10,200	\$ 11,400	\$ 12,600
Audit	\$ 7,000	\$ 7,200	\$ 7,344
Advertising	\$ 2,700	\$ 5,000	\$ 5,000
Interest Paid on Debt	\$ -	\$ 5,460	\$ 4,341
Travel	\$ 4,760	\$ 6,202	\$ 7,075
Staff Development; Workshops; Pro. Dues	\$ 4,686	\$ 6,373	\$ 7,387
General Supplies- Janitorial	\$ 756	\$ 983	\$ 1,134
Janitorial Services	\$ 10,800	\$ 14,040	\$ 16,200
Legal Services & Other Consultants	\$ 4,000	\$ 4,500	\$ 5,000
General Liability & Property Insurance	\$ 3,405	\$ 4,517	\$ 5,576
Office Supplies	\$ 1,800	\$ 2,000	\$ 2,200
Office Furniture and Equipment	\$ 6,500	\$ 2,300	\$ -
Classroom Furniture	\$ 22,980	\$ 7,813	\$ -
Printing (outside office)	\$ 380	\$ 500	\$ 600
Electronic Equipment & Computers	\$ 4,000	\$ 2,000	\$ -
Software	\$ 3,000	\$ 2,000	\$ -
Telephone, including installation	\$ 3,000	\$ 2,700	\$ 3,100
Utilities	\$ 9,800	\$ 12,000	\$ 16,500
Copier Lease	\$ 3,200	\$ 4,200	\$ 4,400
Postage	\$ 900	\$ 1,200	\$ 1,300
Depreciation (playground equipment)	\$ 4,070	\$ 4,810	\$ 5,180
Other Operating Expense	\$ 1,200	\$ 1,800	\$ 2,300
Facility Expense			
Lease	\$ 108,000	\$ 145,319	\$ 168,545
Installation of Playground Equipment	\$ 3,000	\$ -	\$ -
Other Expense			
Authorizing Agency Oversight	\$ 5,980	\$ 7,959	\$ 9,865
Spec. Ed. Contingency Reserve	\$ 18,225	\$ 21,668	\$ 23,544
Total Expenses	\$ 762,003	\$ 1,001,686	\$ 1,103,436
Net Revenue	\$ 149,242	\$ 81,716	\$ 73,779
Non-Operating Changes to Cash Flow			
Charter School Revolving Loan Fund	\$ 149,000	\$ -	\$ -
Principal Paid on Debt	\$ -	\$ (27,469)	\$ (28,588)
Investment-Creation of Reserve Func	\$ (53,000)	\$ -	\$ -
Depreciation	\$ 4,070	\$ 4,810	\$ 5,180
Spec. Ed. Contingency Reserve	\$ 18,225	\$ 21,668	\$ 23,544
Outdoor Equipment - Playground (Fixed Asset)	\$ (37,000)	\$ -	\$ -
Total Non-Operating Changes to Cash Flow	\$ 81,295	\$ (991)	\$ 136
Total Changes to Cash Flow	\$ 230,537	\$ 80,726	\$ 73,915

River Montessori Charter School, Assumptions for Operating Budget

	Rate	Notes
Average Daily Attendance	95%	
Estimated annual COLA	2%	2% for all expenses and revenue, except health insurance, 9%
Revenue		
Block Grant - Rates in 2009-10; increases by COLA years 2 and 3		
Lower Elem - per ADA	\$ 5,758	Estimate based on 2% increase from '08-'09 rate, Governor's budget
Upper Elem - per ADA	\$ 5,844	Estimate based on 2% increase from '08-'09 rate.
Categorical Grant - Per ADA	\$ 528	Based on '08-09 state budget; increases every other year
Class Size Reduction - Lower El - per ADA	\$ 1,071	From '08-09 state budget. Paid in Nov & Jan (yr 1 only Jan)
CA Lottery - Per ADA	\$ 137	Paid quarterly. Based on '08-09 state budget
Economic Impact Aid (total)	\$ 5,864	Minimal floor; Yr 3, up to \$9,206
Charter School Revolving Loan Fund	\$149,000	This is necessary to resolve cash flow shortage caused by the state funding allocation schedule to charter schools in growth periods. Assumes 3% interest rate, 60-month term. Loan service payments begin in the fiscal year after it is received. Loan may be received in start-up period if construction is necessary.
Charter School P&I Grant	\$500,000	Maximum and likely grant is \$600,000; budget assumes minimum grant of \$500,000 - \$210,000 in start-up; \$170,000 in year one; \$120,000 in year two
Interest from Reserve Fund	2.50%	Certificate of Deposit rate, applied to \$53,000
Fundraising	\$0.00	Budget assumes no fundraising but RMCS expects substantial fundraising revenue. More than \$33,000 was raised between Aug 2007 and Oct 2008.
AB 602 Special Ed Funds from State/Federal		See Special Ed revenue and expense page, new with being an LEA
Note 1: Some of block grant will be in-lieu property tax from local districts - amount to be determined later.		
Expenses		
Salaries		
Core Teachers, inc. Resource Spec.	\$ 48,000	Average salary Yr 1; increasing by COLA each yr. Year 2 and Year 3 new hires would be at average rate of \$44,000.
Substitutes	\$ 114	Per day; 10 days per year per core teacher; increase by COLA
P.E. / Music / Art		Based on FTE in Staffing Level Table by \$42,000 base
Principal/Ex. Dir.	\$ 75,000	Increases by COLA each year
Office Manager	\$ 34,000	Increases by COLA each year
Receptionist/Admin Assistant	\$ 24,480	Starts in yr 3; increases by COLA each yr
Benefits		
Health/Vision/Dental	\$ 487.12	Monthly premium; all core teachers and >= 0.65 FTE staff receive
State Teachers Retirement Sys	8.25%	Teachers; Director and substitute
FICA (Federal Social Security)	6.20%	Admin staff; PE/Music/Art teachers
Medicare	1.45%	All staff
Unemployment Insurance	0.50%	All staff
Other Retirement	1.80%	403B/401K for Staff (non-core teachers) >= 0.5 FTE
Workers Comp	1.85%	All staff - Quote from RESIG. Also includes workers comp on volunteer hours x \$8 / hr; 2 hours per student
Other Expense Assumptions		
Instructional Materials	\$15,000	Per room - rooms 6, 7, 8, and 9 purchased in Year 2. Additional supplemental materials to be purchased with additional fundraising or maximum P&I grant. Note: Montessori materials will last for many years.
Library	\$100	Per room per year. Additional supplemental library materials to be purchased with additional fundraising or maximum P&I grant
Music, Art, PE and other classroom equipment and supplies		Additional supplemental equipment and supplies to be purchased with additional fundraising or maximum P&I grant
Interest on Revolving Loan Fund		\$149,000 loan; 3% interest (~ federal Treasury rate); 5 year-term; payments begin in July of year 1
Travel	\$1400 / \$600	\$1400 for Principal; \$600 per core teacher, inc. Res. Spec. , for staff development or other job-related. Some contingent on fundraising.
Staff Development; Pro. Dues	\$ 710	\$710 per Principal/core teacher inc. Res. Spec. Additional staff development expenditures will be paid by fundraising and maximum P&I grant
Legal Services & Consultants		Will also receive pro-bono assistance
Liability & Property Insurance		Liability: \$35/ADA for \$20 million coverage, per RESIG; Property: \$.04 per \$100 prop value (RESIG) Yr 1: \$200,000; Yr 2: \$270,000; Yr. 3: \$280,000
New Classroom Furniture	\$ 7,660	Cost to outfit new classroom; Increases by COLA each year. Classrooms 6, 7, and 8 purchased in year 1; classroom 9 purchased in year 2; may be placed in storage until needed.
Electronic Equipment & Computers		Additional supplemental equipment to be purchased with additional fundraising or maximum P&I grant.
Depreciation		For playground equipment; based on 7-year depreciation schedule
Lease - School Space	\$1.50	Per square foot. See Building Detail
Chartering Agency Oversight	1.0%	To be based on actual costs incurred by Chartering Agency not to exceed 1% of block and categorical grants.
Spec. Ed. Contingency Reserve	2%	Charter to be LEA. Will keep a special ed reserve fund to mitigate risks of high cost student and litigation.

Note: Unless otherwise noted, expenses are estimated based on other operating charter school budgets.

River Montessori Charter School 3-Year Cashflow

Fiscal Year 2009-2010, Year One												
	Jul-09	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10
Cash carried over	\$ 3,264	\$ 166,618	\$ 112,507	\$ 256,087	\$ 203,112	\$ 150,138	\$ 235,332	\$ 318,498	\$ 312,593	\$ 303,189	\$ 284,532	\$ 266,551
Revenue / Cash Inflows												
(Monthly grant apportionment)	0.00	0.00	0.34	0.00	0.00	0.24	0.08	0.08	0.08	0.06	0.06	0.00
Block Grant, Lower El.	\$ -	\$ -	\$ 167,382	\$ -	\$ -	\$ 118,152	\$ 39,384	\$ 39,384	\$ 39,384	\$ 29,538	\$ 29,538	\$ -
Block Grant, Upper El.	\$ -	\$ -	\$ 18,875	\$ -	\$ -	\$ 13,323	\$ 4,441	\$ 4,441	\$ 4,441	\$ 3,331	\$ 3,331	\$ -
Categorical Grant	\$ -	\$ -	\$ 17,054	\$ -	\$ -	\$ 12,038	\$ 4,013	\$ 4,013	\$ 4,013	\$ 3,010	\$ 3,010	\$ -
Class Size Reduction	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 91,571	\$ -	\$ -	\$ -	\$ -	\$ -
CA Lottery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Economic Impact Aid	\$ -	\$ -	\$ 1,994	\$ -	\$ -	\$ 1,407	\$ 469	\$ 469	\$ 469	\$ 352	\$ 352	\$ -
Charter P&I Grant	\$ 170,000											
Interest from reserve fund	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110
AB 602 Special Ed			\$ 7,874	\$ 2,625	\$ 2,625	\$ 2,625	\$ 2,625	\$ 2,625	\$ 2,625	\$ 2,625	\$ 2,625	\$ 2,625
Revolving Loan Fund	\$ 149,000											
Cash Before Expenses	\$ 322,374	\$ 166,728	\$ 325,797	\$ 258,822	\$ 205,848	\$ 297,794	\$ 377,945	\$ 369,540	\$ 363,636	\$ 342,154	\$ 323,498	\$ 269,286
Expenses/Cash Outflows												
Salaries: Instructional												
Core Teachers/Res Spec	\$ 22,400	\$ 22,400	\$ 22,400	\$ 22,400	\$ 22,400	\$ 22,400	\$ 22,400	\$ 22,400	\$ 22,400	\$ 22,400	\$ 22,400	\$ 22,400
Speech Path/Psych.	\$ 1,200	\$ 1,088	\$ 1,088	\$ 1,088	\$ 1,088	\$ 1,088	\$ 1,088	\$ 1,088	\$ 1,088	\$ 1,088	\$ 1,088	\$ 525
Substitutes	\$ 238	\$ 523	\$ 523	\$ 523	\$ 523	\$ 523	\$ 523	\$ 523	\$ 523	\$ 523	\$ 523	\$ 238
P.E. / Music / Art	\$ 700	\$ 1,540	\$ 1,540	\$ 1,540	\$ 1,540	\$ 1,540	\$ 1,540	\$ 1,540	\$ 1,540	\$ 1,540	\$ 1,540	\$ 700
Head of School	\$ 6,250	\$ 6,250	\$ 6,250	\$ 6,250	\$ 6,250	\$ 6,250	\$ 6,250	\$ 6,250	\$ 6,250	\$ 6,250	\$ 6,250	\$ 6,250
Office Manager	\$ 2,833	\$ 2,833	\$ 2,833	\$ 2,833	\$ 2,833	\$ 2,833	\$ 2,833	\$ 2,833	\$ 2,833	\$ 2,833	\$ 2,833	\$ 2,833
Admin Assistant												
Benefits	\$ 7,730	\$ 7,730	\$ 7,730	\$ 7,730	\$ 7,730	\$ 7,730	\$ 7,730	\$ 7,730	\$ 7,730	\$ 7,730	\$ 7,730	\$ 7,730
Books & Supplies												
Instructional Supplies			\$ 2,500									
Library books			\$ 500									
Classroom Equip./Supp.	\$ -		\$ 9,000									
Services & Other Operating Expenses												
Accounting Services			\$ 1,020	\$ 1,020	\$ 1,020	\$ 1,020	\$ 1,020	\$ 1,020	\$ 1,020	\$ 1,020	\$ 1,020	\$ 1,020
Audit									\$ 3,500			
Advertising						\$ 2,025			\$ 675			
Debt Service												
Travel	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 609	\$ 609	\$ 609	\$ 609	\$ 609	\$ 609	\$ 609
Staff Development			\$ 469	\$ 469	\$ 469	\$ 469	\$ 469	\$ 469	\$ 469	\$ 469	\$ 469	\$ 469
Janitorial Supplies	\$ 63	\$ 63	\$ 63	\$ 63	\$ 63	\$ 63	\$ 63	\$ 63	\$ 63	\$ 63	\$ 63	\$ 63
Janitorial Services	\$ 900	\$ 900	\$ 900	\$ 900	\$ 900	\$ 900	\$ 900	\$ 900	\$ 900	\$ 900	\$ 900	\$ 900
Legal/Conslt Services						\$ 571	\$ 571	\$ 571	\$ 571	\$ 571	\$ 571	\$ 571
Liability/Prop. Insurance	\$ 284	\$ 284	\$ 284	\$ 284	\$ 284	\$ 284	\$ 284	\$ 284	\$ 284	\$ 284	\$ 284	\$ 284
Office Supplies	\$ 200		\$ 500			\$ 157	\$ 157	\$ 157	\$ 157	\$ 157	\$ 157	\$ 157
Office Furn./Equipment	\$ 3,500		\$ 500				\$ 2,500					
Classroom Furniture												\$ 22,980
Printing & Duplicating	\$ 200	\$ 16	\$ 16	\$ 16	\$ 16	\$ 16	\$ 16	\$ 16	\$ 16	\$ 16	\$ 16	\$ 16
Elect. Eq. & Computers	\$ 3,500					\$ 500						
Software	\$ 2,000		\$ 1,000									
Telephone	\$ 400	\$ 236	\$ 236	\$ 236	\$ 236	\$ 236	\$ 236	\$ 236	\$ 236	\$ 236	\$ 236	\$ 236
Utilities	\$ 817	\$ 817	\$ 817	\$ 817	\$ 817	\$ 817	\$ 817	\$ 817	\$ 817	\$ 817	\$ 817	\$ 817
Copier Lease	\$ 267	\$ 267	\$ 267	\$ 267	\$ 267	\$ 267	\$ 267	\$ 267	\$ 267	\$ 267	\$ 267	\$ 267
Postage	\$ 75	\$ 75	\$ 75	\$ 75	\$ 75	\$ 75	\$ 75	\$ 75	\$ 75	\$ 75	\$ 75	\$ 75
Other Oper Expense	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100
Facility Expense												
Lease	\$ 9,000	\$ 9,000	\$ 9,000	\$ 9,000	\$ 9,000	\$ 9,000	\$ 9,000	\$ 9,000	\$ 9,000	\$ 9,000	\$ 9,000	\$ 9,000
Playground Eq./Install.	\$ 40,000											
Other Expense												
Auth. Agency Oversight	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,990	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,990
Reserve Fund	\$ 53,000											
Total Cash Outflows	\$ 155,756	\$ 54,221	\$ 69,710	\$ 55,710	\$ 55,710	\$ 62,462	\$ 59,447	\$ 56,947	\$ 60,447	\$ 57,622	\$ 56,947	\$ 81,229
Cash on Hand, End of Month	\$ 166,618	\$ 112,507	\$ 256,087	\$ 203,112	\$ 150,138	\$ 235,332	\$ 318,498	\$ 312,593	\$ 303,189	\$ 284,532	\$ 266,551	\$ 188,056

River Montessori Charter School 3-Year Cashflow

Fiscal Year 2010-2011, Year Two												
	Jul-10	Aug-10	Sep-10	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11
Cash carried over	\$ 188,056	\$ 269,754	\$ 234,952	\$ 203,403	\$ 165,101	\$ 154,878	\$ 137,405	\$ 165,781	\$ 278,975	\$ 236,491	\$ 208,763	\$ 183,535
Revenue / Cash Inflows												
(Monthly grant apportionment)	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.33	0.06	0.06	0.06	0.33
Block Grant, Lower El.	\$ 59,667	\$ 30,129	\$ 30,129	\$ 30,129	\$ 30,129	\$ 30,129	\$ 30,129	\$ 110,100	\$ 32,472	\$ 32,472	\$ 32,472	\$ 122,784
Block Grant, Upper El.	\$ 6,728	\$ 3,397	\$ 3,397	\$ 3,397	\$ 3,397	\$ 3,397	\$ 3,397	\$ 54,359	\$ 11,212	\$ 11,212	\$ 11,212	\$ 75,084
Categorical Grant	\$ 6,140	\$ 3,130	\$ 3,130	\$ 3,130	\$ 3,130	\$ 3,130	\$ 3,130	\$ 15,302	\$ 4,069	\$ 4,069	\$ 4,069	\$ 18,397
Class Size Reduction	\$ -	\$ -	\$ -	\$ -	\$ 24,579	\$ -	\$ 76,087	\$ -	\$ -	\$ -	\$ -	\$ -
CA Lottery	\$ -	\$ -	\$ 3,254	\$ -	\$ -	\$ 17,329	\$ -	\$ -	\$ 4,845	\$ -	\$ -	\$ 4,845
Economic Impact Aid	\$ 352	\$ 352	\$ 352	\$ 352	\$ 352	\$ 352	\$ 352	\$ 1,173	\$ 359	\$ 359	\$ 359	\$ 1,621
Charter P&I Grant	\$ 101,000											\$ 19,000
Interest from reserve fund	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110
AB 602 Special Ed	\$ 2,625	\$ 2,625	\$ 2,625	\$ 2,625	\$ 2,625	\$ 2,625	\$ 2,625	\$ 9,823	\$ 3,524	\$ 3,524	\$ 3,524	\$ 3,524
Revolving Loan Fund												
Cash Before Expenses	\$ 364,678	\$ 309,497	\$ 277,949	\$ 243,146	\$ 229,424	\$ 211,951	\$ 253,235	\$ 356,649	\$ 335,566	\$ 288,238	\$ 260,510	\$ 428,901
Expenses/Cash Outflows												
Salaries: Instructional												
Core Teachers/Res Spec	\$ 30,997	\$ 30,997	\$ 30,997	\$ 30,997	\$ 30,997	\$ 30,997	\$ 30,997	\$ 30,997	\$ 30,997	\$ 30,997	\$ 30,997	\$ 30,997
Speech Path/Psych.	\$ 1,800	\$ 1,402	\$ 1,402	\$ 1,402	\$ 1,402	\$ 1,402	\$ 1,402	\$ 1,402	\$ 1,402	\$ 1,402	\$ 1,402	\$ 688
Substitutes	\$ 339	\$ 746	\$ 746	\$ 746	\$ 746	\$ 746	\$ 746	\$ 746	\$ 746	\$ 746	\$ 746	\$ 339
P.E. / Music / Art	\$ 1,071	\$ 2,356	\$ 2,356	\$ 2,356	\$ 2,356	\$ 2,356	\$ 2,356	\$ 2,356	\$ 2,356	\$ 2,356	\$ 2,356	\$ 1,071
Head of School	\$ 6,375	\$ 6,375	\$ 6,375	\$ 6,375	\$ 6,375	\$ 6,375	\$ 6,375	\$ 6,375	\$ 6,375	\$ 6,375	\$ 6,375	\$ 6,375
Office Manager	\$ 2,890	\$ 2,890	\$ 2,890	\$ 2,890	\$ 2,890	\$ 2,890	\$ 2,890	\$ 2,890	\$ 2,890	\$ 2,890	\$ 2,890	\$ 2,890
Admin Assistant												
Benefits	\$ 10,295	\$ 10,295	\$ 10,295	\$ 10,295	\$ 10,295	\$ 10,295	\$ 10,295	\$ 10,295	\$ 10,295	\$ 10,295	\$ 10,295	\$ 10,295
Books & Supplies												
Instructional Supplies	\$ 21,500								\$ 18,500			\$ 20,000
Library books								\$ 700				
Classroom Equip./Supp.	\$ -							\$ -				
Services & Other												
Operating Expenses												
Accounting Services	\$ 950	\$ 950	\$ 950	\$ 950	\$ 950	\$ 950	\$ 950	\$ 950	\$ 950	\$ 950	\$ 950	\$ 950
Audit				\$ 3,500					\$ 3,600			
Advertising							\$ 2,500		\$ 2,500			
Debt Service	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744
Travel							\$ 1,034	\$ 1,034	\$ 1,034	\$ 1,034	\$ 1,034	\$ 1,034
Staff Development							\$ 1,062	\$ 1,062	\$ 1,062	\$ 1,062	\$ 1,062	\$ 1,062
Janitorial Supplies	\$ 82	\$ 82	\$ 82	\$ 82	\$ 82	\$ 82	\$ 82	\$ 82	\$ 82	\$ 82	\$ 82	\$ 82
Janitorial Services	\$ 1,170	\$ 1,170	\$ 1,170	\$ 1,170	\$ 1,170	\$ 1,170	\$ 1,170	\$ 1,170	\$ 1,170	\$ 1,170	\$ 1,170	\$ 1,170
Legal/Conslt Services	\$ 375	\$ 375	\$ 375	\$ 375	\$ 375	\$ 375	\$ 375	\$ 375	\$ 375	\$ 375	\$ 375	\$ 375
Liability/Prop. Insurance	\$ 376	\$ 376	\$ 376	\$ 376	\$ 376	\$ 376	\$ 376	\$ 376	\$ 376	\$ 376	\$ 376	\$ 376
Office Supplies							\$ 333	\$ 333	\$ 333	\$ 333	\$ 333	\$ 333
Office Furn./Equipment												\$ 2,300
Classroom Furniture												\$ 7,813
Printing & Duplicating	\$ 200	\$ 27	\$ 27	\$ 27	\$ 27	\$ 27	\$ 27	\$ 27	\$ 27	\$ 27	\$ 27	\$ 27
Elect. Eq. & Computers							\$ 2,000					
Software							\$ 2,000					
Telephone	\$ 225	\$ 225	\$ 225	\$ 225	\$ 225	\$ 225	\$ 225	\$ 225	\$ 225	\$ 225	\$ 225	\$ 225
Utilities	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
Copier Lease	\$ 350	\$ 350	\$ 350	\$ 350	\$ 350	\$ 350	\$ 350	\$ 350	\$ 350	\$ 350	\$ 350	\$ 350
Postage	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100
Other Oper Expense	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150
Facility Expense												
Lease	\$ 11,934	\$ 11,934	\$ 11,934	\$ 11,934	\$ 11,934	\$ 11,934	\$ 11,934	\$ 11,934	\$ 11,934	\$ 11,934	\$ 11,934	\$ 11,934
Playground Eq./Install.												
Other Expense												
Auth. Agency Oversight Reserve Fund	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,979		\$ -	\$ -	\$ -	\$ 3,979
Total Cash Outflows	\$ 94,924	\$ 74,546	\$ 74,546	\$ 78,046	\$ 74,546	\$ 74,546	\$ 87,454	\$ 77,675	\$ 99,075	\$ 79,475	\$ 76,975	\$ 108,661
Cash on Hand, End of Month	\$ 269,754	\$ 234,952	\$ 203,403	\$ 165,101	\$ 154,878	\$ 137,405	\$ 165,781	\$ 278,975	\$ 236,491	\$ 208,763	\$ 183,535	\$ 320,240

River Montessori Charter School 3-Year Cashflow

Fiscal Year 2011-12, Year Three												
	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12
Cash carried over	\$ 320,240	\$ 287,795	\$ 254,166	\$ 224,851	\$ 187,621	\$ 181,013	\$ 153,077	\$ 185,742	\$ 314,768	\$ 287,930	\$ 259,069	\$ 230,209
Revenue / Cash Inflows												
<i>(Monthly grant apportionment)</i>	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.33	0.06	0.06	0.06	0.33
Block Grant, Lower El.	\$ 33,122	\$ 33,122	\$ 33,122	\$ 33,122	\$ 33,122	\$ 33,122	\$ 33,122	\$ 112,416	\$ 32,472	\$ 32,472	\$ 32,472	\$ 127,416
Block Grant, Upper El.	\$ 11,436	\$ 11,436	\$ 11,436	\$ 11,436	\$ 11,436	\$ 11,436	\$ 11,436	\$ 84,979	\$ 20,099	\$ 20,099	\$ 20,099	\$ 109,661
Categorical Grant	\$ 4,069	\$ 4,069	\$ 4,069	\$ 4,069	\$ 4,069	\$ 4,069	\$ 4,069	\$ 17,980	\$ 4,945	\$ 4,945	\$ 4,945	\$ 21,124
Class Size Reduction	\$ -	\$ -	\$ -	\$ -	\$ 27,021	\$ -	\$ 78,834	\$ -	\$ -	\$ -	\$ -	\$ -
CA Lottery	\$ -	\$ -	\$ 4,314	\$ -	\$ -	\$ 5,693	\$ -	\$ -	\$ 5,693	\$ -	\$ -	\$ 5,693
Economic Impact Aid	\$ 552	\$ 552	\$ 552	\$ 552	\$ 552	\$ 552	\$ 552	\$ 1,780	\$ 552	\$ 552	\$ 552	\$ 1,903
Charter P&I Grant												
Interest from reserve fund	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110	\$ 110
AB 602 Special Ed	\$ 3,524	\$ 3,524	\$ 3,524	\$ 3,524	\$ 3,524	\$ 3,524	\$ 3,524	\$ 10,610	\$ 4,410	\$ 4,410	\$ 4,410	\$ 4,410
Revolving Loan Fund												
Cash Before Expenses	\$ 373,054	\$ 340,609	\$ 311,294	\$ 277,665	\$ 267,456	\$ 239,520	\$ 284,725	\$ 413,619	\$ 383,052	\$ 350,519	\$ 321,659	\$ 500,526
Expenses/Cash Outflows												
Salaries: Instructional												
Core Teachers/Res Spec	\$ 36,383	\$ 36,383	\$ 36,383	\$ 36,383	\$ 36,383	\$ 36,383	\$ 36,383	\$ 36,383	\$ 36,383	\$ 36,383	\$ 36,383	\$ 36,383
Speech Path/Psych.	\$ 2,200	\$ 1,581	\$ 1,581	\$ 1,581	\$ 1,581	\$ 1,581	\$ 1,581	\$ 1,581	\$ 1,581	\$ 1,581	\$ 1,581	\$ 842
Substitutes	\$ 395	\$ 870	\$ 870	\$ 870	\$ 870	\$ 870	\$ 870	\$ 870	\$ 870	\$ 870	\$ 870	\$ 395
P.E. / Music / Art	\$ 1,274	\$ 2,804	\$ 2,804	\$ 2,804	\$ 2,804	\$ 2,804	\$ 2,804	\$ 2,804	\$ 2,804	\$ 2,804	\$ 2,804	\$ 1,274
Head of School	\$ 6,503	\$ 6,503	\$ 6,503	\$ 6,503	\$ 6,503	\$ 6,503	\$ 6,503	\$ 6,503	\$ 6,503	\$ 6,503	\$ 6,503	\$ 6,503
Office Manager	\$ 2,948	\$ 2,948	\$ 2,948	\$ 2,948	\$ 2,948	\$ 2,948	\$ 2,948	\$ 2,948	\$ 2,948	\$ 2,948	\$ 2,948	\$ 2,948
Admin Assistant	\$ 2,040	\$ 2,040	\$ 2,040	\$ 2,040	\$ 2,040	\$ 2,040	\$ 2,040	\$ 2,040	\$ 2,040	\$ 2,040	\$ 2,040	\$ 2,040
Benefits	\$ 12,890	\$ 12,890	\$ 12,890	\$ 12,890	\$ 12,890	\$ 12,890	\$ 12,890	\$ 12,890	\$ 12,890	\$ 12,890	\$ 12,890	\$ 12,890
Books & Supplies												
Instructional Supplies								\$ 4,000				
Library books								\$ 800				
Classroom Equip./Supp.								\$ -				
Services & Other												
Operating Expenses												
Accounting Services							\$ 3,150	\$ 3,150				\$ 6,300
Audit				\$ 3,600					\$ 3,672			
Advertising												\$ 5,000
Debt Service	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744	\$ 2,744
Travel							\$ 1,179	\$ 1,179	\$ 1,179	\$ 1,179	\$ 1,179	\$ 1,179
Staff Development							\$ 1,231	\$ 1,231	\$ 1,231	\$ 1,231	\$ 1,231	\$ 1,231
Janitorial Supplies							\$ 189	\$ 189	\$ 189	\$ 189	\$ 189	\$ 189
Janitorial Services	\$ 1,246	\$ 1,246	\$ 1,246	\$ 1,246	\$ 1,246	\$ 1,246	\$ 1,454	\$ 1,454	\$ 1,454	\$ 1,454	\$ 1,454	\$ 1,454
Legal/Conslt Services							\$ 833	\$ 833	\$ 833	\$ 833	\$ 833	\$ 833
Liability/Prop. Insurance	\$ 465	\$ 465	\$ 465	\$ 465	\$ 465	\$ 465	\$ 465	\$ 465	\$ 465	\$ 465	\$ 465	\$ 465
Office Supplies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 367	\$ 367	\$ 367	\$ 367	\$ 367	\$ 367
Office Furn./Equipment				\$ -								\$ -
Classroom Furniture												\$ -
Printing & Duplicating	\$ 200						\$ 67	\$ 67	\$ 67	\$ 67	\$ 67	\$ 67
Elect. Eq. & Computers								\$ -				
Software		\$ -	\$ -	\$ -								
Telephone	\$ 129	\$ 129	\$ 129	\$ 129	\$ 129	\$ 129	\$ 129	\$ 129	\$ 517	\$ 517	\$ 517	\$ 517
Utilities	\$ 1,375	\$ 1,375	\$ 1,375	\$ 1,375	\$ 1,375	\$ 1,375	\$ 1,375	\$ 1,375	\$ 1,375	\$ 1,375	\$ 1,375	\$ 1,375
Copier Lease	\$ 367	\$ 367	\$ 367	\$ 367	\$ 367	\$ 367	\$ 367	\$ 367	\$ 367	\$ 367	\$ 367	\$ 367
Postage	\$ 54	\$ 54	\$ 54	\$ 54	\$ 54	\$ 54	\$ 54	\$ 54	\$ 217	\$ 217	\$ 217	\$ 217
Other Oper Expense							\$ 383	\$ 383	\$ 383	\$ 383	\$ 383	\$ 383
Facility Expense												
Lease	\$ 14,045	\$ 14,045	\$ 14,045	\$ 14,045	\$ 14,045	\$ 14,045	\$ 14,045	\$ 14,045	\$ 14,045	\$ 14,045	\$ 14,045	\$ 14,045
Playground Eq./Install.												
Other Expense												
Auth. Agency Oversight Reserve Fund	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,933	\$ -	\$ -	\$ -	\$ -	\$ 4,933
Total Cash Outflows	\$ 85,258	\$ 86,443	\$ 86,443	\$ 90,043	\$ 86,443	\$ 86,443	\$ 98,983	\$ 98,850	\$ 95,122	\$ 91,450	\$ 91,450	\$ 104,940
Cash on Hand, End of Month	\$ 287,795	\$ 254,166	\$ 224,851	\$ 187,621	\$ 181,013	\$ 153,077	\$ 185,742	\$ 314,768	\$ 287,930	\$ 259,069	\$ 230,209	\$ 395,586

CDE Charter School Planning and Implementation Grant Budget

P&I Grant Amount: \$ 600,000
 alternately \$ 500,000

Maximum Grant: \$600,000

Minimum Grant: \$500,000

	Start-Up	Year 1 (09-10)	Year 2 (10-11)	Start-Up	Year 1 (09-10)	Year 2 (10-11)
Amount of Grant	\$250,000	\$200,000	\$150,000	\$210,000	\$170,000	\$120,000
Expenditures						
Salary - Director of School	\$25,000	\$44,000	\$0	\$25,000	\$67,954	\$26,814
Instructional Supplies	\$90,000	\$15,700	\$88,000	\$70,000	\$2,500	\$60,000
Library	\$47,000	\$5,000	\$15,900	\$29,000	\$500	\$700
Music, Art, P.E., classroom equipment and supplies	\$0	\$14,000	\$3,500	\$0	\$9,000	\$0
Advertising	\$1,743	\$3,300	\$5,000	\$1,500	\$2,700	\$5,000
Staff Development	\$0	\$10,000	\$10,000	\$0	\$4,686	\$6,373
Legal Services & Other Consultants	\$9,825	\$10,000	\$10,000	\$7,000	\$4,000	\$4,500
Office Supplies	\$0	\$1,800	\$2,000	\$0	\$1,800	\$2,000
Office Furniture and Equipment	\$0	\$7,500	\$2,300	\$0	\$6,500	\$2,300
Classroom Furniture	\$40,000	\$24,500	\$8,300	\$40,000	\$22,980	\$7,813
Purchase and installation, playground equipment		\$40,000			\$40,000	
Printing	\$1,800	\$1,200	\$1,000	\$1,500	\$380	\$500
Electronic Equipment/Computers	\$0	\$16,000	\$2,000	\$0	\$4,000	\$2,000
Software	\$0	\$7,000	\$2,000	\$0	\$3,000	\$2,000
Lease	\$34,632	\$0	\$0	\$36,000	\$0	\$0
Total	\$250,000	\$200,000	\$150,000	\$210,000	\$170,000	\$120,000



River Montessori Charter School



MODEL EMERGENCY MANAGEMENT PLAN

Mitigation • Preparedness • Response • Recovery



Developed for Marin County Schools by:
MARIN COUNTY OFFICE OF EDUCATION

MARY JANE BURKE

Marin County Superintendent of Schools

Support provided through a grant for
SCHOOL EMERGENCY PREPAREDNESS AND CRISIS MANAGEMENT
by the
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April 2008 Adapted by River Montessori Charter School 9/2008

e•mer•gen•cy

An unstable or crucial time or state of affairs in which a decisive change is impending, especially one with the distinct possibility of a highly undesirable outcome.

-- Webster's Ninth Collegiate Dictionary

FORWARD

In 1995, the Marin County Office of Education developed the School Emergency Disaster and Incident Preparedness Plan as a model for developing Marin County district and school contingency plans. The Model Plan was published on the Marin County Office of Education Emergency Services website <<http://mcoeweb.marin.k12.ca.us/EmerPrep>> for school districts to download and customize, as appropriate.

In 2003, the Marin County Office of Education received a grant from the U. S. Department of Education, Office of Safe and Drug Free Schools and the U.S. Department of Homeland Security to strengthen emergency preparedness in Marin Schools. This grant has provided funds for this update of the Model Emergency Management Plan. This guide may be modified and reproduced for individual school and district use.

The Marin County Office of Education would like to express its gratitude to the Marin County School/Law Enforcement Partnership, Marin Schools Emergency Preparedness Council, Marin County Office of Emergency Services and the Parents Disaster Advisory Council for their support and assistance with this project. The Marin County Office of Education also acknowledges the work of the following agencies, districts and schools which served as invaluable exemplars with resource materials, references, and best practices from which this revised Model School Emergency Management Plan has been adapted.

- American Red Cross
- California Governor's Office of Emergency Services
- Federal Emergency Management Agency (FEMA)
- Contra Costa County, *Model Emergency Plan for Schools*
- Fayette County Public Schools, *School-Centered Emergency Management and Recovery Guide*
- Kentucky Community Crisis Response Board, *School-Centered Emergency Management and Recovery Guide*
- Los Angeles Unified School District, *Model Safe School Plan*
- McGuire Associates, *Disability Evacuation Plan*
- Pittsburgh Public Schools, *Safe Schools Plan*
- San Francisco Unified School District, *District Emergency Management Plan*
- U.S. Department of Education, Office of Safe and Drug-Free Schools, *Practical Information on Crisis Planning: A Guide for Schools and Communities*

The MCOE Model Emergency Management Plan may be downloaded from the MCOE Emergency Services website at <http://mcoeweb.marin.k12.ca.us/EmerPrep>.



Comments and inquiries may be directed to the Marin County Office of Education, Emergency Services at 415/499-5866.

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INTRODUCTION TO EMERGENCY MANAGEMENT

SCHOOL EMERGENCY MANAGEMENT PLAN

A. PARTNERSHIPS IN PREPAREDNESS, RESPONSE AND RECOVERY

California Education Code Section 35295 requires public and private schools to develop school disaster plans so that students and staff will act instinctively and correctly when a disaster strikes. This Model School Emergency Management Plan is designed to provide administrators with a resource for protecting students, staff and school facilities, as well as to describe the responsibilities of staff members for a wide range of emergency and disaster situations that may occur.

Within this Model School Emergency Management Plan are emergency preparedness and response instructions, guidelines, templates and forms to help protect the safety, security and well-being of students and school staff during many types of emergencies. This document has been developed as a comprehensive resource for all districts, schools and child development centers to promote coordinated preparedness measures and assist them in standardizing response protocols to improve response to and recovery from an emergency or disaster affecting their site. This Model Plan may be adapted to the capabilities and special needs of each site.

A wave of school shootings in the 1990s and the horrific events of September 11, 2001 stunned the country and ushered in a new age of national emergency awareness. More than ever before, schools are faced with ongoing challenges for a much broader range of emergency situations. Districts and schools must have a comprehensive plan that outlines response not only to severe weather and natural disasters, chemical accidents and medical emergencies, but also to campus violence and various types of terrorist threats.

The health and welfare of students and school staff in crisis situations is dependent upon sound emergency preparedness. School personnel are obligated to prepare themselves to render competent service through all phases of an emergency including planning, training, drilling, response, recovery and evaluation, as may be required. **The Model School Emergency Management Plan describes actions and response protocols for crisis situations so districts and schools can quickly and adequately restore the school community to a safe and orderly learning environment.**

This Model School Emergency Management Plan has been prepared in compliance with legal requirements and in cooperation with the Marin County Office of Emergency Services, the Marin County Office of Education and the Marin Schools Emergency Preparedness Council and other members of the Marin County school community. In the event of a widespread emergency such as an earthquake, available government and county resources will be overtaxed and may be unable to respond to all requests for assistance. **This plan assumes that schools must be self-sufficient for a time and may be required to make many crucial decisions and provide shelter to the immediate community.**

B. HOW TO USE THIS PLAN

The Model School Emergency Management Plan is designed as a comprehensive reference to assist schools in providing a safe learning environment. It incorporates best practices for

handling emergency situations that have been deployed by school districts elsewhere in the country. The emergency management teams and procedures outlined in this plan are consistent with California's Standardized Emergency Management System (SEMS) and the National Incident Management System (NIMS), both modeled after the Incident Command System (ICS). A copy of the Model School Emergency Management Plan may be downloaded at the Marin County Office of Education Emergency Services website at <http://mcoeweb.marin.k12.ca.us/EmerPrep/>

Using the procedures, actions and sample forms provided herein, districts and schools are encouraged to create a site-based Emergency Management Plan that meets the individual resources and circumstances of each school and reflects its unique characteristics and needs. Every plan should include:

- a designated chain of command;
- specific roles for team members;
- specific procedures to implement in the event of an emergency.

The district should identify local community agencies to engage in planning (police, fire department, emergency medical, hospitals, mental health centers, local/regional emergency management agency, etc.). Next, a district support team, in partnership with community agencies, should review the contents of this School Emergency Management Plan and adapt text and emergency protocols to fit individual site circumstances. The district support team should also update local district and community agency phone numbers and assist schools in sharing this important safety information annually with all faculty, staff, students and parents.

The final step in the emergency management planning process is to communicate and practice the plan. Orient new personnel as they arrive on campus and review all changes with local public safety agencies. Keep multiple copies of the plan in accessible locations. Ensure that team leaders have a copy of the plan at home. Each school district will need to determine how best to conduct the training and implementation process in individual schools. Larger districts may need a well-coordinated and systematic way to conduct training to better prepare school-based teams to adapt the district plan to individual site needs. While most schools are adept at practicing techniques such as fire and earthquake drills, many have not rehearsed responses to events such as chemical release, intruders on campus or emergencies that require lockdown or reverse evacuation.

C. FOUR PHASES OF EMERGENCY MANAGEMENT

This Model School Emergency Management Plan is presented in four main sections which conform to the four phases the U.S. Department of Education Office of Safe and Drug-Free Schools uses to describe planning for, responding to and recovering from emergencies: Mitigation/Prevention, Preparedness, Response and Recovery. Each of these topics is introduced briefly below and applied in detail in the respective sections of the plan.

- ◆ **Section I – Mitigation/Prevention** addresses what schools can do to reduce exposure to risks and hazards and lessen the potential impact of an emergency situation. Mitigation efforts can occur both before and after emergencies or disasters.



- ◆ **Section II – Preparedness** focuses on the roles and responsibilities of the school emergency response teams and the actions, exercises and supplies needed for various emergency scenarios. These activities develop readiness and response capabilities.
- ◆ **Section III – Response** presents detailed procedures for implementing appropriate actions for most types of emergencies that may be encountered in a school setting. In this phase, schools mobilize resources needed to address the emergency at hand. Emphasis is placed on minimizing the effects of the emergency or disaster.
- ◆ **Section IV – Recovery** focuses on general strategies to follow after the emergency and restoring affected areas to pre-emergency conditions in order to return to the normal learning environment as quickly as possible. Recovery activities may be both short-term and long-term; ranging from restoration of essential utilities such as water and power, to mitigation measures designed to prevent future occurrences of a specific threat.

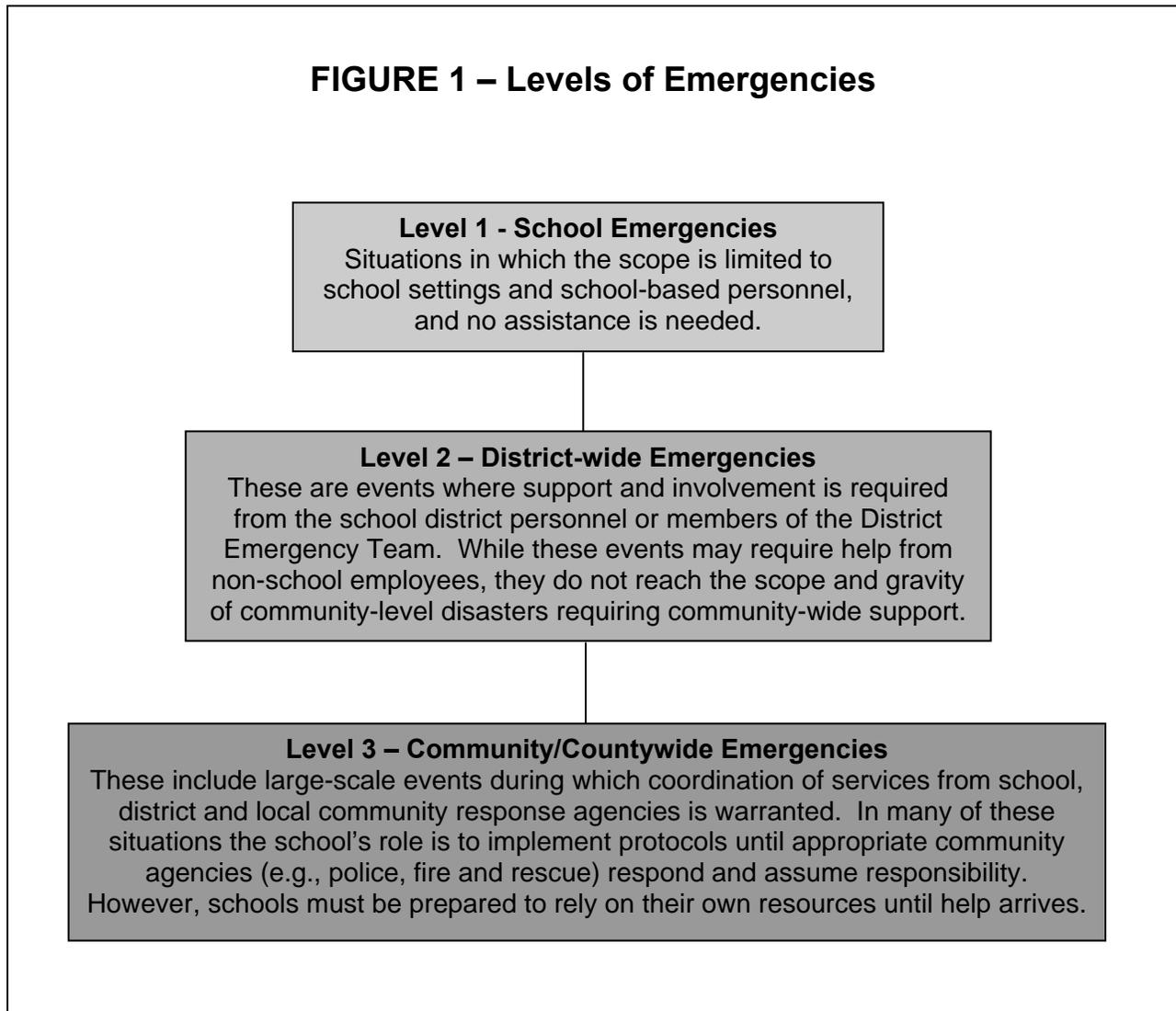
Each section contains information that outlines the basic components of these four critical areas. All four phases of emergency management should be planned for in advance in order to be most effective. The **APPENDICES** contain supplemental emergency information including cross-jurisdictional agreements, checklists, forms, sample letters and other supporting documentation. The action checklists and forms can be duplicated as templates or they can be incorporated directly into existing plans. The forms should be adapted or augmented to fit the school mission, staffing, location and other unique circumstances.

D. LEVELS OF EMERGENCIES

THREE LEVELS OF EMERGENCIES: Emergencies are often described in terms of the following three levels:

- ◆ **Level One (School Level) Emergency:** A localized emergency, with low impact on school operations, which school personnel can handle by following the procedures in their emergency plan. Examples: power outage, unexpected death, suicide threat.
 - ◆ **Level Two (District Level) Emergency:** A moderate to severe emergency, somewhat beyond the individual school response capability, which affects students district-wide and may require mutual aid assistance from the fire department, local police, etc. Examples: intruder, shooting on campus.
 - ◆ **Level Three (Community) Emergency:** A major disaster, clearly beyond the response capability of school district personnel, where a significant amount of mutual aid assistance will be required, recovery time will be extensive, and response time from major support agencies may be seriously delayed and/or impaired. Examples: severe earthquake with injuries and/or structural damage, flooding, explosions, chemical spills requiring evacuation, death of multiple staff or students (as in a bus accident), hostage situation. In a catastrophic disaster, schools must be prepared to rely on their own resources because assistance from others may be delayed. A large-scale event such as an earthquake that affects one school will also affect the surrounding community. There may be widespread telephone outages, road blockages, gridlock and congestion on the highways, damage to utility systems, roof collapse, chemical or electrical fires, release of hazardous materials, flying debris, injuries and death caused by falling objects and smoke inhalation.
-

FIGURE 1 illustrates the three levels of emergencies.



HOMELAND SECURITY LEVELS OF EMERGENCIES

In March 2002, the White House issued Homeland Security Directive-3, which established five threat conditions for possible terrorist attack:

Green	=	Low
Blue	=	Guarded
Yellow	=	Elevated
Orange	=	High
Red	=	Severe

The American Red Cross developed a complementary set of general explanations and guidelines for preparedness activities for each level, which have been adapted for use by the Marin County Office of Education in Figure 2, on the following page.

FIGURE 2 – Homeland Security Advisory System



**Homeland Security Advisory System
Recommendations for Schools**

Level of Risk	Recommended Action
<div style="background-color: red; width: 100%; height: 100%; display: flex; align-items: center; justify-content: center;"> <div style="background-color: white; padding: 5px; border: 1px solid black;"> <p style="text-align: center;">SEVERE (Red)</p> </div> </div>	<ul style="list-style-type: none"> • <i>Complete all recommended actions at lower levels.</i> • Listen to radio and TV for current information and instructions. • Be alert and immediately report suspicious activity to proper authorities. • Close school if recommended to do so by appropriate authorities. • 100% identification check (i.e. driver's license retained at front office) and escort anyone entering school other than students, staff and faculty. • Ensure School Site Crisis Team members are available for students, staff and faculty.
<div style="background-color: orange; width: 100%; height: 100%; display: flex; align-items: center; justify-content: center;"> <div style="background-color: white; padding: 5px; border: 1px solid black;"> <p style="text-align: center;">HIGH (Orange)</p> </div> </div>	<ul style="list-style-type: none"> • <i>Complete all recommended actions at lower levels.</i> • Be alert and report suspicious activity to proper authorities. • Review emergency procedures and supplies. • Discuss children's fears concerning possible terrorist attacks in consultation with School Site Crisis Team. • Prepare to handle inquiries from anxious parents and media.
<div style="background-color: yellow; width: 100%; height: 100%; display: flex; align-items: center; justify-content: center;"> <div style="background-color: white; padding: 5px; border: 1px solid black;"> <p style="text-align: center;">ELEVATED (Yellow)</p> </div> </div>	<ul style="list-style-type: none"> • <i>Complete all recommended actions at lower levels.</i> • Be alert and report suspicious activity to proper authorities. • Ensure all emergency supplies are stocked and ready. • Distribute copies of <i>Terrorism: Preparing for the Unexpected</i> to students, staff and parents.
<div style="background-color: blue; width: 100%; height: 100%; display: flex; align-items: center; justify-content: center;"> <div style="background-color: white; padding: 5px; border: 1px solid black;"> <p style="text-align: center;">GUARDED (Blue)</p> </div> </div>	<ul style="list-style-type: none"> • <i>Complete all recommended actions at lower level.</i> • Be alert and report suspicious activity to proper authorities. • Provide safety training to staff and practice emergency drills pursuant to school emergency procedures. • Review communications plan and update emergency contact information. • Review emergency supplies and supplement as necessary.
<div style="background-color: green; width: 100%; height: 100%; display: flex; align-items: center; justify-content: center;"> <div style="background-color: white; padding: 5px; border: 1px solid black;"> <p style="text-align: center;">LOW (Green)</p> </div> </div>	<ul style="list-style-type: none"> • Develop school emergency plans per District Bulletins • Offer American Red Cross "Masters of Disaster" curriculum for grades K-8 on emergency preparedness for natural disasters. • Ensure selected staff members are trained on first aid, CPR and AED.

References: American National Red Cross –<http://www.redcross.org/services/disaster/beprepared/hsas/schools.pdf>

E. PLAN DEVELOPMENT, IMPLEMENTATION AND UPDATES

The School Emergency Management Plan will be:

- **DEVELOPED** by a team of school administrators and staff, working with first responders in the local jurisdiction;
- **INITIATED** by the principal or designee when conditions exist which warrant its execution;
- **IMPLEMENTED** by all staff, who will remain at school in the capacity of “Disaster Service Workers” and perform those duties as assigned until released by the principal. See California Government Code §3100.
- **REVIEWED** at least annually.

Emergency and disaster functions are identified and pre-assigned before the beginning of the school year. The Emergency teams and contact information will be updated at least annually. New personnel will be assigned to vacated command staff positions. Procedures will be revised as needed. All emergency preparedness training and drills will be documented, and updates to the plan will be recorded.

The elements of emergency planning, preparedness and management are:

- ◆ **Leadership:** Leadership ensures that emergency preparedness will be a priority and that adequate resources will be allocated to create and implement district and school-based plans. At the district level leadership should come directly from the superintendent, at the school level, from the principal.
 - ◆ **Incident Command System:** The ICS is a standardized organizational structure that is the basis of SEMS and NIMS, designed to handle: Management, Operations, Logistics, Planning, and Administration & Finance. The ICS allows for appropriate utilization of facilities, equipment, personnel, procedures, and communications. The Incident Commander is the highest-ranking official in charge of the emergency response operations.
 - ◆ **School Emergency Management Plan:** A modified version of this model plan should be tailored and fine-tuned to meet the unique needs and resources of each individual school. The site-based plan includes team assignments, emergency numbers, protocols, and the four phases of emergency management: Mitigation, Preparedness, Response and Recovery.
 - ◆ **School Emergency Teams:** Site-based teams of individuals with specific duties to perform in order to prepare for and respond to emergencies. The School Emergency Teams develop the plan to meet individual school needs and implement the plan in the event of an emergency.
 - ◆ **Communication:** Plans should have established lines of internal communication (within the school) and external communication (with the district office and community). Plans should include provisions for after-hours communication (telephone tree), and alternate means if telephone lines are disabled.
-

- ◆ **Emergency Management Protocols:** Emergency Management Protocols are the step-by-step procedures for schools to implement in the event of an emergency.
- ◆ **School Emergency Actions:** These are a set of clear directives that may be implemented across a number of emergency situations. These actions include Drop/Cover and Hold, Evacuation, Lockdown, Shelter in Place, Stand-by and All Clear, in addition to several specialized actions such as Offsite or Reverse Evacuation and Student Release.
- ◆ **Staff Responsibilities:** School personnel have a moral and legal responsibility to all students in their care. Just as school staff members will rely on first responders, public agencies and others to open blocked roads, repair utilities, perform rescue work, etc., those members of the community will rely on schools to provide care for their children in an emergency.

California Government Code §3100 declares that public employees are “Disaster Service Workers”, subject to activities as may be assigned to them by their superiors or by law. This law applies to public school employees in the following cases: 1) when a local emergency has been proclaimed, 2) when a state emergency has been proclaimed, or 3) when a federal disaster declaration has been made. The law has two ramifications:

- a) Public school employees may be pressed into service as Disaster Service Workers and may be asked to do jobs other than their usual duties for periods of time exceeding their normal working hours. Teachers and staff members may be required to remain at school and serve as Disaster Service Workers until they are released by the principal or superintendent.
- b) In those cases, their Workers’ Compensation Coverage becomes the responsibility of state government (Office of Emergency Services). Their overtime compensation, however, is paid by the school. These circumstances apply only when a local or state emergency has been declared.

Ideally, the school plan should include a rough prioritization of which teacher and staff members might be released first (such as those with small children at home). Staff members who live a long distance from school should be encouraged to make special preparations for remaining at school a longer time, such as arranging with a neighbor to check on their home and keeping extra supplies at school.

- ◆ **Training:** Training is important on at least three levels:
 - General awareness training for all staff;
 - First Aid, CPR and School Emergency Response Training (SERT) for all staff;
 - Team training to address specific emergency response or recovery activities, such as Student Release, Search and Rescue, Shelter Management.
- ◆ **Practice:** Practicing the plan consists of drills, tabletop and functional exercises, orientation for staff, etc. It is generally recommended that schools start with basic orientation and tabletop exercises prior to engaging in full-scale simulations or drills.
- ◆ **Personal Emergency Plans:** Staff members should develop personal and family emergency response plans. Each family should anticipate that a staff member may be required to remain at school following a catastrophic event. Knowing that the family is prepared and can handle the situation will enable school staff to do their job more effectively

F. AUTHORITIES AND REFERENCES

The following are the state authorizations and mandates upon which this emergency preparedness plan is based:

California Code of Regulations, Title 5, Division 1, Chapter 2, Subchapter 3, Article 2, § 560 - mandates that School Boards adopt a policy for use by district schools in formulating individual civil defense and disaster preparedness plans.

California Code of Regulations, Title 19 and California Government Code, § 8607-8607.2 - specifies that the Standardized Emergency Management System, which includes the major structure of the Incident Command System, will be implemented and used in handling disaster/crisis situations.

California Education Code, Title 2, Division 3, Part 21, Chapter 2, Article 10.5, § 35295 - 35297 - requires School Boards to “*establish an earthquake emergency procedure system in every private school building under its jurisdiction having an occupant capacity of 50 or more pupils or more than one classroom.*”

APPENDIX A provides the significant legislation and the Marin County Office of Education's adopted Board Policies and Administrative Regulations. A sample community shelter agreement with the American Red Cross is also included, along with a sample agreement for use of a school site as a facility for mass vaccinations and a disaster field hospital.

#

I – MITIGATION/PREVENTION

Mitigation . . . encourages long-term reduction of hazard vulnerability.

-- FEMA, 2002

A. REDUCING EXPOSURE TO HAZARDS AND RISKS

MITIGATION is defined as proactive action taken to reduce or eliminate the adverse effects of natural and man-made hazards on people and property. The goal of MITIGATION is to decrease or eliminate the need for response as opposed to simply increasing response capability. Mitigation begins by conducting a district and school hazard assessment, which requires a self-appraisal of major areas effecting school safety. These areas include geographic location of buildings, proximity of potential hazards such as waterways, availability of buses for possible evacuation, structural integrity of buildings, etc.

The terms "hazard" and "risk" are often used interchangeably in the context of mitigation. Hazards and risks are identified through vulnerability analysis, consequence modeling, code/regulation compliance, quantitative risk assessment and historical data correlations.

Risk is the product of potential consequences and the expected frequency of occurrence. The basic concept of acceptable risk is the maximum level of damage to the building that can be tolerated, related to a realistic risk event scenario or probability. Consequences may include death, serious injury, the extent of structural damage, monetary loss, interruption of use, or environmental impact.

Risk managers use two different evaluative methods in risk and hazard analysis: deterministic and probabilistic. These two methods can complement one another to provide additional insights to the analysis.

- **DETERMINISTIC ANALYSIS** relies on correlations developed through experience or testing, to predict the outcome of a particular hazard scenario.
- **PROBABILISTIC ANALYSIS** evaluates the statistical likelihood that a specific event will occur and what losses and consequences will result. History from events involving similar buildings or equipment, building contents, or other items should be considered, along with the frequency of occurrences of a particular type of event.

Mitigation assesses and addresses the safety and integrity of the following types of hazards to minimize or prevent adverse impacts:

- ◆ **FACILITIES** -_window seals, HVAC systems, building structure
- ◆ **SECURITY** - functioning locks, controlled access to the school
- ◆ **THREATS** - probability of natural disasters or accidents
- ◆ **SCHOOL ENVIRONMENT** - social climate on campus

Resources include: existing safety plans, security and safety-related district policies, floor plans of buildings, maps of local evacuation routes, school crime reports, known safety and security concerns, logs of police calls for service, student and faculty handbooks, disciplinary files and local memos of safety concerns.

FACILITIES - Structural and non-structural measures can mitigate the effects of natural hazard incidents.

- **STRUCTURAL MITIGATION** includes physical rectification and standards such as building codes, materials specifications and performance regulations for the construction of new buildings; the retrofitting of existing structures to make them more a hazard-resistant; and protective devices such as retaining walls. California's frequency of earthquake activity has resulted in sophisticated seismic building codes for all buildings and special inspection requirements, enforced by the state, for school buildings. **Building codes establish the minimum standards for safety.** The construction of hazard-resistant structures is perhaps the most cost-effective mitigation measure. Hazard mitigation in existing structures is generally more costly, but when carried out effectively before a disaster, prevents loss of life, reduces damage and avoids the outlay of associated costs for response and recovery operations.
- **NON-STRUCTURAL MITIGATION** measures typically concentrate on the securing of light fixtures to ceilings, installation of wind shutters, strapping or bolting generators to walls, and numerous other techniques to prevent injuries and allow for the continued use of the school site. School occupants are particularly vulnerable to nonstructural damage. Excessive sway in any building may cause damage to nonstructural components such as hung lath and plaster ceilings, partitions, water pipes, ductwork, electrical conduits, and communication lines. Storage units, filing cabinets and library shelving shift or fall if not properly braced. Although students and staff may duck under desks and be safe from falling objects, ceiling components that drop in hallways and stairs can make movement difficult, particularly if combined with power failure and loss of lights. Additional falling hazards that are common in schools are wall-mounted televisions or ceiling mounted projectors.

SECURITY - Communities are encouraged to treat schools as essential community facilities because of the significant impact on students and the locale if a damaged school is closed for an extended period of time. A higher level of protection is appropriate for facilities that will enhance community recovery, including schools which may be designated as emergency shelters, and other buildings that support vital services. A hazard assessment should assure that the school buildings have functioning locks and controlled access.

THREATS - Mitigation requires assessment of local threats, including the probability of industrial accidents and natural disasters. Threat assessment considers potential hazards in the neighborhood such as high voltage power lines; facilities containing toxic, chemically reactive and/or radioactive materials; transportation routes of trucks and trains carrying hazardous materials; underground gas and oil pipelines; underground utility vaults; above-ground transformers; multi-story buildings vulnerable to damage or collapse; and water towers and tanks. Since location is a key factor in determining the risks associated with natural hazards, land use plans are a valuable tool in identifying areas that are most vulnerable to the impacts of natural hazards such as wildfires, earthquakes and flooding.

- **FIRE** - Of the many hazards that can endanger a school facility and its service to the community, the most prevalent is fire. Design against fire has long been built into state building codes, in the form of approved materials, fire-resistant
-

assemblies, exiting requirements, the width and design of stairs, the dimensions of corridors, fire suppression systems, and many other standards.

- **EARTHQUAKE** - A simple seismic evaluation that focuses specifically on schools is rapid visual screening. This method is intended as an initial step in identifying hazardous buildings and their deficiencies. It is most useful for large school districts by providing an economical preliminary evaluation of the seismic risks, thereby reducing the number of buildings that require a more detailed evaluation by a structural engineer. The visual survey of a building can be completed in less than 30 minutes and can be accomplished from the street without benefit of entry into a building. However, hazardous details may not be visible, and seismically dangerous structures may not be identified as such. Nonstructural interior components are not evaluated.
- **FLOODING** - Flooding is the most common natural hazard in the United States, affecting over 20,000 local jurisdictions and representing more than 70 percent of Presidential Disaster Declarations. Factors that can affect the frequency and severity of flooding and the resultant types of damage include: channel obstructions due to fallen trees, accumulated debris and ice jams; culvert openings that are insufficient to move floodwaters; erosion of shorelines and stream banks; deposition of sediment that is carried inland by wave action; and dam and levee failure that may result in sudden flooding of areas thought to be protected.

SCHOOL ENVIRONMENT - School policies and protocols should support a safe school environment and orderly procedures during emergencies. Determine who is responsible for overseeing violence prevention strategies in the school, and disseminate information to staff regarding the early detection of potentially dangerous behaviors. Conduct an assessment to determine how the school environment may impact its vulnerability to certain types of crises. Review incident data and determine how the school will address major problems with regard to student crime and violence. Provide staff training on identification of risk and protective factors to help children. Link prevention and intervention programs to community resources, including health and mental health. Develop strategies for improving communication and students and between students and staff. Provide safe and confidential ways for students to report potentially violent incidents.

Schools and districts should be active partners in community-wide risk assessment and mitigation planning. The local fire department can assist school administrators in identifying potential structural and non-structural hazards. To help agencies work together, they may want to develop a Memorandum of Understanding (MOU) that outlines each agency's responsibility during an emergency. A Sample MOU between a school district and a local fire department is included among the Sample Agreements in **APPENDIX B**.

B. CONDUCTING A SAFE SCHOOLS HAZARDS ASSESSMENT

Each school year, prior to the arrival of the teaching staff, the principal and/or designee should undertake a physical survey of all hazards likely to be encountered in the evacuation routes from classrooms and other activity rooms to safe, open-space areas. **During the first month of the school year, each teacher should conduct a classroom hazard assessment to be submitted to the principal.** The purpose of these hazards

assessments is to identify and report for correction any existing conditions that pose potential risk to the occupants of school buildings and to the facilities.

COMPOSITION OF THE HAZARD ASSESSMENT TEAM: The Hazard Assessment Team should be a diverse group of people concerned with the safety of the school. An ideal group might include:

- Custodian/Maintenance Supervisor
- School Administrator
- Local Fire Official or Civil/Structural Engineer

OPTIONAL:

- Teacher
- Social Worker or Counselor
- Student
- Parent

⇒ **Make regular school safety audits and**

ACTION CHECKLIST: Prior to conducting a hazard assessment/school safety audit, the team members should review the School Emergency Management Plan, blueprints of the campus, school accident and incident data and prior assessment reports. A proactive process will help maintain a safe and secure learning environment.

- Determine what crisis plans exist in the district, school, and community.
- Identify all stakeholders involved in crisis planning.
- Gather information about the school facility, such as maps and the location of utility shutoffs.
- Connect with community emergency responders to identify local hazards.
- Review the prior safety audit to examine school buildings and grounds.
- Conduct an assessment to determine how these problems—as well as others—may impact school vulnerability to specific crises.
- Develop procedures for communicating with staff, students, families, and the media.
- Establish procedures to account for students during a crisis.
- Identify the necessary equipment that needs to be assembled to assist staff in an emergency.

BUILDING AND CLASSROOM HAZARD HUNT: The purpose of the hazard hunt is to identify any special circumstances which exist in the school or near the campus which present unique problems or potential risk to people or property. A walk-through inspection of each area of each building should be conducted using the School Safety/Hazard Checklist, included in **APPENDIX C**.

The interior and exterior portions of all school buildings and school grounds should be assessed for potential hazards that may impact the site, the staff and the students, including the following:

- Classrooms
 - Corridors
 - Laboratory/Shop
 - Offices
 - Bathrooms
 - Boiler Room
 - Kitchen/Cafeteria
 - Teacher's Lounge
-

- Custodial Room
- Storage Room
- Yard (and Playground)
- Multipurpose Room
- Computer Lab
- Parking Lot
- Outside structures and Fencing
- Gymnasium

The hazards may include:

- Proximity to toxic, flammable, corrosive, chemically reactive or other hazardous materials
- Proximity of high voltage power lines
- Proximity to earthquake fault lines
- Likelihood and possible effects of flooding, including proximity to creeks that may surge over their banks
- Likelihood of a wildland fire
- Likelihood of severe weather
- Hanging fixtures on ceilings, such as fluorescent lights.
- Locations of windows, particularly those near doorways.
- Stability of bookcases and shelving in classrooms as well as the objects on the shelves, cabinets and hanging on walls.
- Stability of water heaters.
- Security of AV equipment, computers, TV monitors, piano, aquariums, etc. from motion during an earthquake.
- Impediments to evacuation and transportation
- Inadequate storage of chemicals and labeling on containers.

HAZARD MITIGATION CHECKLIST: The School Safety/Hazard Assessment Checklist included in **APPENDIX C** describes specific areas and conditions for hazard inspection. Indicate the names of those conducting the inspection and the inspection date in the spaces provided at the bottom of each form. Complete each section of the checklist. For problem areas, briefly describe the situation and actions requested to correct or remove the identified hazard, if possible to do so.

Recommendations should be constructive in nature and attempt to offer to the principal or administrator solutions to safety problems in the school. Following a major disaster, a school community might reexamine how building configurations may be rearranged to improve access and services to avoid repetitive damage. Post-disaster mitigation may be applied on a structure-by-structure basis to strengthen hazard resistance and provide energy efficiency and environmental sensitivity.

STAFF SKILLS INVENTORY FOR EMERGENCY MANAGEMENT PLANNING:

A Staff Skills Inventory will help administrators plan assignments to emergency teams. A sample inventory is provided among the forms in **APPENDIX E**. The information provided should identify the following areas in which members of the staff have training or expertise:

- First Aid
- CPR
- Hazardous Materials
- Emergency Medical
- Incident Debriefing
- CB Radio/Ham Radio Experience
- Search and Rescue
- Counseling/Mental Health
- Fire Fighting
- Media Relations
- Multilingual Fluency

TEACHER SURVEY - STUDENTS NEEDING SPECIAL ASSISTANCE:

At the beginning of each semester, teachers should provide to the main office the name(s) of students in the class who will require special assistance in the event of an emergency and the type of assistance needed. A variety of emergency conditions which may alter needs (e.g., severe weather, evacuation, hazardous materials, etc.) should be considered. Preparedness for students needing special assistance is addressed in more detail in **Section II, PREPAREDNESS**

C. VISITOR SCREENING POLICY

A visitor-screening policy (described later in this section) should be developed with signage to direct school visitors to the sign-in area.

- Post signs at key arrival points directing all visitors to the entry door.
- Pass visitors through an office or sign-in area that offers verbal and visual contact with staff or volunteers.
- Ask all visitors to sign-in and provide them with an I.D. badge or other visitor pass
- Designate individuals to ask the person's name, area or room to be visited, and nature of the visit.
- If the visitor is new to the school or unsure of the room location, have a volunteer or staff member meet or accompany him/her.
- Direct visitors to return to sign out upon leaving the building. There should be no exceptions to the policy.
- Acquaint parents, PTA organizations, etc. with the policy and the need to know who is in the building.
- Familiarize all teachers and staff with the visitor screening policy.
- Encourage staff to question people on the campus without a visitor pass and ask them to check in with the office before proceeding to the intended destination.

D. VIOLENCE PREVENTION

The first step in school violence prevention is to perform a systematic assessment to determine what the school might do proactively to inhibit hostile and anti-social behavior. One approach is to examine how the peaceful interaction of individuals and groups is facilitated by policies, programs and processes in the classroom, the school building and the district office. Does the school have a policy on weapons possession and aggressive behavior? Are students aware of the policy? Is it consistently enforced? How is such behavior supported or discouraged by the school climate and the expectations of the staff and other students? Has school staff received training in nonviolent conflict resolution? Are students appropriately supervised? Have staff members been taught to spot the potential for such incidents and to defuse them?

The principal can help establish school norms of nonviolence and pro-social community by developing sincere, caring relationships with groups of students and individuals, maintaining a high profile, visiting classrooms, and being accessible to students and staff.

RISK FOR HARM ASSESSMENT

Risk for Harm assessment provides a framework for schools to conceptualize risk based on a review of warning signs, general risk factors, precipitating events and stabilizing factors. A response plan to maintain school safety and help students gain access to needed services or interventions is based on the present risk for harm. The following descriptors

are not an exhaustive list of behaviors and possible responses but provide a useful frame of reference.

◆ **Low/No Risk for Harm**

Upon review it appears there is insufficient evidence for any current risk for harm. Situations under this category can include misunderstandings, poor decision making, false accusations from peers (seeking to get other peers in trouble), etc. Responses may include (but are not limited to): investigation of the situation, notification and involvement of others as needed, administrative action.

◆ **Minor Risk for Harm**

A student has displayed minor early warning signs, but assessment reveals little history of serious risk factors or dangerous behavior. Stabilizing factors appear to be reasonably well-established. There may be evidence of the unintentional infliction of distress on others (insensitive remarks, “teasing” taken too far, etc.). Responses may include (but are not limited to): review of school records, parent notification, psychological consult, security notification, administrative action.

◆ **Moderate Risk for Harm**

A student has displayed some early warning signs and may have existing risk factors or recent precipitating events, but also may have some stabilizing factors. There may be evidence of internal emotional distress (depression, social withdrawal, etc.) or of intentional infliction of distress on others (bullying, intimidation, seeking to cause fear, etc.). Responses may include (but are not limited to): security response, parent notification, psychological consult/evaluation, background or records check, ongoing case management.

◆ **High Risk for Harm**

A student has displayed significant early warning signs, has significant existing risk factors and/or precipitating events and few stabilizing factors. May not qualify for hospitalization or arrest at present, but requires referrals for needed services and active case management. Responses may include (but are not limited to): immediate action to secure student, security response, parent notification, psychological consult/evaluation, background check, ongoing case management.

◆ **Imminent Risk for Harm**

A student is, or is very close to, behaving in a way that is potentially dangerous to self and/or others. Examples include: detailed threats of lethal violence, suicide threats, possession and/or use of firearms or other weapons, serious physical fighting, belligerence, etc. Responses may include (but are not limited to): immediate action to secure student, arrest or hospitalization, facility LOCKDOWN, security response, parent notification, background or records check and ongoing case management.

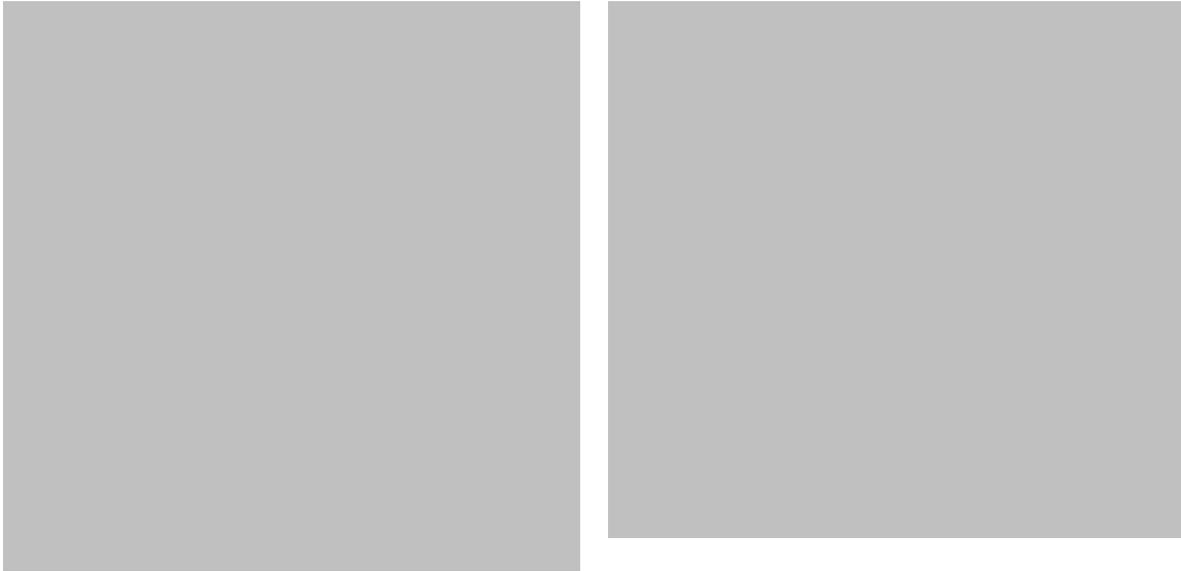
PREVENTION PROGRAMS AND STRATEGIES

There is great variation in the types of violence prevention strategies and programs instituted at different schools.

- ◆ **SCHOOL-MANAGEMENT-BASED** - These programs focus on discipline and student behavior, alternative schools and cooperative relationships with police and law enforcement.
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- ◆ EDUCATIONAL AND CURRICULUM-BASED - These programs concentrate on teaching students behavior-management skills and nonviolent conflict resolution.
- ◆ ENVIRONMENTAL MODIFICATION - These are programs based on changing student behavior by changing students' social or physical environment. This includes installing metal detectors and hiring security guards, but also includes larger-scale programs like setting up after-school programs and increasing or decreasing school size.

Among the many violence prevention strategies used are:



There is no one-size-fits-all solution. To reduce school violence schools must innovate, try multiple approaches, conduct proper evaluations and make the information available to parents to enhance both parental options and accountability.

#

II – PREPAREDNESS

SECTION II – PREPAREDNESS

The time to fix the roof is when the sun is shining.

-- John Fitzgerald Kennedy

PREPAREDNESS focuses on the steps that can be taken to plan for various emergency scenarios. Preparedness involves the coordination of efforts between the school district, individual schools, local public safety agencies and the community at large. Good planning will facilitate a rapid, coordinated, effective response when a crisis actually occurs.

- DETERMINE what crisis plans exist in the district, school, and community.
- IDENTIFY all stakeholders involved in crisis planning.
- DEVELOP procedures for communicating with staff, students, families, and the media.
- ESTABLISH procedures to account for students during a crisis.
- GATHER information about the school facility, such as maps and the location of utility shutoffs.
- ASSEMBLE the necessary equipment needed to assist staff in a crisis.

A. STANDARDIZED EMERGENCY MANAGEMENT SYSTEM (SEMS) NATIONAL INCIDENT MANAGEMENT SYSTEM (NIMS)

The Standardized Emergency Management System (SEMS), California law since 1994, and the National Incident Management System (NIMS), federally implemented beginning Fiscal Year 2007, are designed to centralize and coordinate emergency response through the use of standardized terminology and processes. SEMS is used throughout California to manage and coordinate any emergency response involving more than one agency or jurisdiction. NIMS is the nation's first standardized management approach that unifies federal, state and local government resources for incident response. Implementation of a common language and set of procedures greatly facilitates flow of communication and coordination among all responding agencies to improve tracking, deployment, utilization, and demobilization of needed mutual aid resources.

SEMS and NIMS establish the Incident Command System (ICS) as a standardized organizational structure to establish a unified command and line of authority, with common operational terminology for the management of all major incidents. The Emergency Operations Plan (EOP) must be consistent with the SEMS/NIMS concepts, structure and terminology. The EOP must describe roles and responsibilities, assignment of personnel, policies and protocols for providing emergency support.

Use of SEMS during a disaster response is an eligibility requirement for local governments, agencies and special districts to receive STATE reimbursement following a disaster. A federal directive requires state and local governments and special districts

to comply with NIMS in order to qualify for FEDERAL reimbursement for emergency response/recovery costs. The following table compares SEMS and NIMS.

<p style="text-align: center;">SEMS Standardized Emergency Management System</p>	<p style="text-align: center;">NIMS National Incident Management System</p>
<p>A standardized approach to emergency management in California, using several key concepts:</p> <ul style="list-style-type: none"> ▪ A management tool called the Incident Command System (ICS); ▪ Mutual aid systems in which similar organizations assist each other in emergencies; and ▪ Multiple agency coordination under which diverse organizations work together and communicate with each other. 	<p>A comprehensive, national approach to incident management that is applicable at all jurisdictional levels and across functional disciplines. The intent is to:</p> <ul style="list-style-type: none"> • Be applicable across a full spectrum of potential incidents and hazard scenarios, regardless of size or complexity. • Use an ALL-HAZARDS approach. • Improve coordination and cooperation between public and private entities.
<p>WHY USE SEMS?</p> <ul style="list-style-type: none"> • To qualify to receive <u>State</u> reimbursement • To improve coordination between response agencies • To coordinate flow of information and resources • To improve mobilization, use and tracking of resources 	<p>WHY USE NIMS?</p> <ul style="list-style-type: none"> • To qualify to receive <u>Federal</u> reimbursement • To provide a coordinated response • To standardize domestic incident response that reaches across all levels of government and all response agencies
<p>ELEMENTS OF SEMS</p> <p>Key Components:</p> <ul style="list-style-type: none"> • ICS is a primary component • Multi-Inter-Agency Coordination • Master Mutual Aid System • Operational Areas <p>FIVE levels:</p> <ul style="list-style-type: none"> • State Level • Regional Level (Coastal Region) • Op Area Level (County) • School District Level (or Cities) • School Site Level <p>Key Functions:</p> <ul style="list-style-type: none"> • MANAGEMENT/COMMAND • OPERATIONS • PLANNING/INTELLIGENCE • LOGISTICS • FINANCE/ADMINISTRATION 	<p>ELEMENTS OF NIMS</p> <p>Key Components:</p> <ul style="list-style-type: none"> • Command and Management • Preparedness • Resource Management • Communications and Information Management • Supporting Technologies • Ongoing Management/Maintenance <p>Key Organizational Structures:</p> <ul style="list-style-type: none"> • ICS - Incident Command System • Multi-Agency Coordination System • Public Information Systems <p>Key Functions:</p> <ul style="list-style-type: none"> • MANAGEMENT/COMMAND • OPERATIONS • PLANNING/INTELLIGENCE • LOGISTICS • FINANCE/ADMINISTRATION

INCIDENT COMMAND SYSTEM (ICS): The Incident Command System provides a flexible management system that is adaptable to incidents involving multi-jurisdictional response. The ICS is the combination of personnel, facilities, equipment, procedures and communications operating within a common organizational framework to manage the resources required to effectively accomplish objectives related to the emergency or incident.

The main concepts behind the ICS structure are: a) every emergency requires the execution of certain tasks or functions; b) every incident needs a person in charge; c) no one should direct more than seven people; and d) no one should report to more than one person.

Components of the ICS include:

- Common terms established for organizational functions, resources and facilities;
- Unified command structure with a common set of objectives and strategies;
- Modular organization which expands or contracts as the incident progresses;
- Manageable span of control by one person;
- Pre-designated incident facilities;
- Integrated communications;
- Five-function structure for management of all major incidents.

The ICS is organized into five functional areas for on-scene management of all major incidents: Management, Operations, Planning, Logistics, Finance/Administration.

Management: Provides overall emergency policy and coordination. This function is directed by the Incident Commander (IC) who is typically the principal. The IC is assisted in carrying out this function by an Incident Command Team which includes a Public Information Officer, Safety Officer, and Agency Liaison.

Operations: Directs all tactical operations of an incident including implementation of response activities according to established emergency procedures and protocols, care of students, first aid, crisis intervention, search and rescue, site security, damage assessment, evacuations, and the release of students to parents.

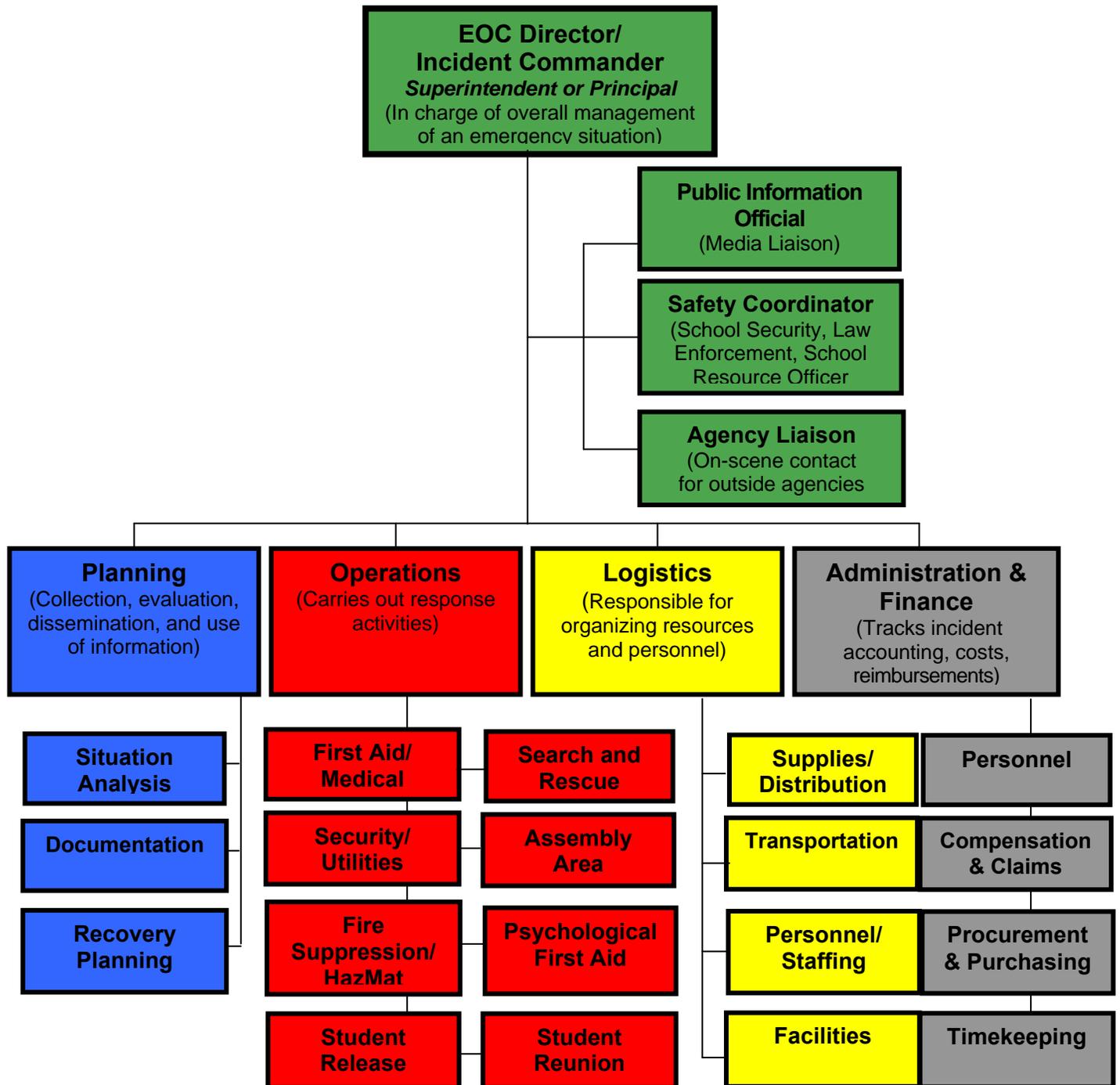
Planning: Collects, evaluates and disseminates information needed to measure the size, scope and seriousness of an incident and to plan an appropriate response.

Logistics: Supports emergency operations by securing and providing needed personnel, equipment, facilities, resources and services required for incident resolution; coordinating personnel; assembling and deploying volunteer teams; and facilitating communications among emergency responders. This function may take on a major role in extended emergency situations.

Administration /Finance Oversees all financial activities including purchasing of necessary materials, tracking incident costs, arranging contracts for services, timekeeping for emergency responders, submitting documentation to FEMA for reimbursement and recovering school records following an emergency.

Figure 3 presents a simplified Emergency Management Organization Chart for School Districts, based on SEMS/NIMS and adapted by MCOE. Responsibilities and operational duties are detailed on the following pages.

FIGURE 3 – Emergency Management Organization



Emergency Management Roles and Responsibilities

The district superintendent or school principal assumes management responsibility as the Incident Commander and activates others as needed. School personnel transition from their daily jobs to assigned emergency functions. The ICS is flexible in size and scope. Depending upon the magnitude of the emergency, the ICS can expand or contract as needed. For a small incident, the principal may perform all the roles of the ICS structure, while the school district may mobilize the entire staff for a large-scale disaster.

Title	Role, Responsibility
Management: Incident Command	Responsible for development of school's plan and overall management of emergency situations; establish/manage Command Post; activate ICS; determine strategies to implement protocols and adapt as needed
Safety, Security Law Enforcement	Monitor safety conditions of an emergency situation and develop measures for ensuring the safety of building occupants (students, staff, volunteers, responders); document activities
Public Information Media Liaison	Develop relationship with local media reps.; prepare media releases; establish "media center" near Command Post; coordinate information with Incident Commander and District Support Team; document activities
Liaison to Outside Agencies	Develop working knowledge of local/regional agencies; serve as the primary on-scene contact for outside agencies assigned to an incident; assist in accessing services when the need arises; document activities
Planning/Intelligence: Situation Analysis	Assist Incident Commander in the collection and evaluation of information about an incident as it develops (including site map and area map of related events); assist with ongoing planning efforts; maintain incident time log; document activities
Operations: Student Accounting and Release	Analyze school staffing to develop a Student Accounting and Release Plan (accounting from individual teachers to Student Accounting and Release to Command Post); implement plan in an emergency; document activities
Facility & Environmental	Monitor site utilities (electric, gas, water HVAC) shut off only if danger exists or directed by Incident Commander; assist in securing facility (locking gates and perimeter doors, posting caution tape as needed, etc); document activities
First Aid, CPR, Medical	Establish medical triage with staff trained in first aid, CPR; provide/oversee care given to the injured; distribute supplies (latex gloves, bandages, etc.); request additional supplies from Logistics; document activities
Crisis Intervention & Response	Provide and access psychological first aid services for those in need (working with "Operations: Medical"); access local/regional providers for ongoing crisis counseling for students, staff, parents; document activities
Food, water, sanitation	Coordinate the rationed distribution of food and water (prolonged emergencies); establish secondary toilet facilities in the event of water or plumbing failure; request needed supplies from Logistics; document activities
Logistics: Communications	Establish/oversee communications center and activities during an emergency (two-way radio, battery-powered radio, written updates, etc.); develop telephone tree for after-hours communication; document activities
Supplies	Establish and maintain "Emergency Team Toolbox" (fresh batteries, etc.); coordinate access to and distribution of supplies during an emergency; monitor inventory of supplies and equipment; document activities
Administration & Finance: Documentation	Responsible for overall documentation and record keeping activities; when possible, photograph or videotape damage to property; develop a system to monitor and track expenses and financial losses; secure all records

EMERGENCY OPERATIONS CENTER

The purpose of the Emergency Operations Center (EOC) is to coordinate and organize all relevant information about the emergency or disaster in one place. This helps the school district manage resources for the affected school sites. The EOC at the district level is also where resource allocations can be made, and responses tracked and coordinated with the County Office of Education and the county Operational Area Emergency Operations Center, as needed. Strategic objectives should be usually broad, encompassing overall goals such as a) life safety; b) property safety; c) protection of the environment.

The EOC is usually located in a centralized area, at or near the school district office. It may be in a meeting room or special room designated for it that is safe and accessible. The area must have sufficient space to set up a communication system and a centralized area for the section chiefs to coordinate emergency management. A pre-planned alternate site should also be in place in the event the primary EOC location is not usable.

EOC Director. At the district level, the superintendent, as EOC Director, has clear authority to set overall policy, command and direct the personnel and resources under his or her control, and to coordinate response and recovery activities.

EOC Staff. The EOC staff is organized according to the same five functions as the Incident Command System. The role of the EOC staff is to obtain and deliver needed resources to the affected schools sites, not to provide “hands on” assistance to the various sites that are dealing with actual field activities.

General criteria to activate an Emergency Operations Center

- Resources are required beyond local capabilities.
- The emergency is of long duration (more than 3 days).
- Major policy decisions will or may be needed.
- A local or state emergency is declared.
- Activation is advantageous to the successful management of an emergency.

The Incident Commander at the schools leads the Management/ Incident Command Team and directs on-scene operations. The Management Team includes the Public Information Officer, the Safety Coordinator and the Agency Liaison of the district or school. The Incident Commander must be familiar with the available resources, coordinate and document all response actions, and effectively communicate response strategies to others handling the incident.

Responsibilities: The Incident Commander (IC) is solely responsible for on-scene emergency/disaster operations and remains at or near the Incident Command Post/EOC to observe and direct all operations.

- ❑ Assess the scene and ensure the safety of students, staff and others on campus.
- ❑ Lead by example: the behavior sets tone for staff and students.
- ❑ Activate and manage the Command Post.
- ❑ Develop strategies to implement response protocols.
- ❑ Coordinate response efforts within the affected area.
- ❑ Monitor action plan and organizational effectiveness.
- ❑ Determine the need for and provide inter-agency coordination.
- ❑ Constantly assess the situation and adapt appropriate strategies as needed.

Start-Up Actions

- ❑ Obtain personal safety equipment; i.e., hard hat, vest, clipboard.
- ❑ Assess type and scope of emergency. Evaluate safety of evacuation route.
- ❑ Conduct quick walkabout to determine and anticipate needs.
- ❑ Determine threat to human life and structures.
- ❑ Implement emergency/disaster plan and hazard specific procedures.
- ❑ Ensure that Command Post is safe and ready for operations.
- ❑ Develop and communicate an incident action plan with objectives and a time frame.
- ❑ Establish appropriate level of organization; activate functions as needed.
- ❑ Contact District Office when Command Post is set up.

Ongoing Operational Duties

- ❑ Continue to monitor and assess total school situation:
 - ❑ View site map periodically for Search & Rescue progress and damage assessment information.
 - ❑ Check with coordinators for periodic updates; Attempt a summit every two hours to assess situation.
 - ❑ Reassign personnel as needed.
 - ❑ Report (through Communications) to school district on status of students, staff, campus as needed. (Site Status Report)
 - ❑ Develop and communicate revised incident action plans as needed.
 - ❑ Begin student release when appropriate, after student accounting is complete.
 - ❑ Authorize release of information; refer media to District Office or PIO.
 - ❑ Plan regular breaks for all staff and volunteers. Take care of caregivers!
 - ❑ Release teachers as appropriate per district guidelines. By law, during a disaster, teachers become “disaster workers.”
 - ❑ Remain on and in charge of your campus until redirected or released by the Superintendent of Schools.
 - ❑ Be prepared for requests by the American Red Cross to use facility as a shelter.
-

INCIDENT COMMANDER (cont'd)

Closing Down

- ∅ Authorize deactivation of sections, branches, or units when they are no longer required.
- ∅ At the direction of the Superintendent of Schools, deactivate the entire emergency response. If the Fire Department or other outside agency calls an "All Clear," contact the district before taking any further action.
- ∅ Ensure that any open actions not yet completed will be taken care of after deactivation.
- ∅ Ensure the return of all equipment and reusable supplies to Logistics.
- ∅ Close out all logs. Ensure that all logs, reports, and other relevant documents are completed and provided to the Documentation Unit.
- ∅ Proclaim termination of the emergency and proceed with recovery operations if necessary.
- ∅ Provide input to the after-action report.

Command Post Equipment/ Supplies

- Campus map
- Master keys
- Staff and student rosters
- Disaster response forms
- Emergency/disaster plan
- Duplicate rosters (2 sets)
- Tables & chairs (if CP is outdoors)
- Campus Emergency Planning Guidelines
- Job description clipboards
- Command Post tray (pens, etc.)
- School district radio
- Campus 2-way radios
- AM/FM radio (battery)
- Bullhorn
- Vests

News media can play a key role assisting the school in getting emergency/disaster related information to the public *as soon as it is available*. The Public Information Officer is a member of the Incident Command Staff. Media queries should be referred to the PIO or the District Office

Responsibilities: The Public Information Officer (PIO) acts as the official spokesperson for the school district in an emergency situation and ensures that information support is provided on request; that information releases are consistent, accurate, and timely; and that appropriate information is being provided to all required agencies.

Start-Up Actions

- ❑ Determine a possible “news center” site as a media reception area (located away from the Command Post and students). Get approval from the Incident Commander.
- ❑ Identify yourself as the “PIO” (vest, visor, sign, etc.)
- ❑ Consult with District PIO to coordinate information release.
- ❑ Assess situation and obtain statement from Incident Commander.
- ❑ Advise arriving media that the site is preparing a press release and approximate time of its issue.
- ❑ Open and maintain a position log of your actions and all communications. If possible, tape media briefings. Keep all documentation to support the history of the event.

Operational Duties

- ❑ Keep up-to-date on the situation.
- ❑ Issue/read statements approved by the Incident Commander that reflect:
 - Reassurance — “Everything’s going to be OK.”
 - Incident cause and time of origin; size and scope of the incident.
 - Current situation — condition of school site, evacuation progress, care being given, injuries, student release location, etc. Do not release any names.
 - Resources in use.
 - Best routes to school if known and appropriate.
 - Any information school wishes to be released to the public.
- ❑ When answering questions, be complete and truthful, always considering confidentiality and emotional impact. Avoid speculation, bluffing, lying, talking “off the record,” arguing, etc. Avoid use of the phrase “no comment.”
- ❑ Remind school site/staff volunteers to refer all questions from media or waiting parents to the PIO.
- ❑ Update information periodically with Incident Commander.
- ❑ Ensure announcements & other information are translated into other languages as needed.
- ❑ Monitor news broadcasts about incident. Correct any misinformation heard.

Closing Down

- ❑ At the Incident Commander’s direction, release PIO staff no longer needed.
 - ❑ Direct staff members to sign out through Timekeeping.
 - ❑ Return equipment and reusable supplies to Logistics.
 - ❑ Close out all logs. Provide logs and other relevant documents to the Documentation Unit.
-

PUBLIC INFORMATION OFFICER (cont'd)

GUIDELINES FOR SPEAKING TO THE MEDIA

When speaking to the press about school emergencies, it is extremely important to adhere to the following guidelines:

- **READ** all press statements
- **BE AVAILABLE** for press inquiry
- **RE-STATE** the nature of the incident; its cause and time of origin
- **DESCRIBE** the size and scope of the incident
- **REPORT ON** the *current* situation
- **SPEAK ABOUT** the resources being utilized in response activities
- **REASSURE** the public that everything possible is being done
- **Do not release students' names**
- **BE TRUTHFUL**, but consider the emotional impact the information could have upon listeners
- **AVOID** speculation; do not talk "off the record"
- **DO NOT USE** the phrase "no comment"
- **SET UP** press times for updates
- **CONTROL** media location

Equipment/Supplies

- ID Vest
- Battery operated AM/FM radio
- Scotch tape/masking tape
- School Staff Directory
- Laminated school site map poster board size for display
- School site map(s) and area maps as 8x11" handouts
- Forms:
 - Disaster Public Information Release Work Sheet
 - Sample Public Information Release
 - School Profile or School Accountability Report Card (SARC)
- Hard hat
- Paper/pencils/marketing pens
- Scissors

The Agency Liaison is a member of the Incident Command Staff. This position is staffed when there is a district-level emergency.

Responsibilities: The Agency Liaison serves as the point of contact for representatives from assisting organizations and agencies outside the school district and assists in coordinating the efforts of these outside agencies by ensuring the proper flow of information.

Start Up Actions

- ❑ Check in with Incident Commander for situation briefing.
- ❑ Determine your personal operating location and set up as necessary.
- ❑ Obtain necessary equipment and supplies from Logistics.
- ❑ Put on position identifier, such as vest, if available.
- ❑ Open and maintain a position log. Maintain all required records and documentation to support the history of the emergency or disaster.

Operational Duties

- ❑ Brief agency representatives on current situation, priorities and incident action plan.
- ❑ Ensure coordination of efforts by keeping IC informed of agencies' action plans.
- ❑ Provide periodic update briefings to agency representatives as necessary.

Closing Down

- ❑ At the Incident Commander's direction, deactivate the Agency Liaison position and release staff no longer needed. Direct staff members to sign out through Timekeeping.
- ❑ Return equipment and reusable supplies to Logistics.
- ❑ Close out all logs. Provide logs and other relevant documents to the Documentation Unit.

Equipment/ Supplies

- ID Vest
 - Two-way radio, if available
 - School Staff Directory
 - Hard hat
 - Clipboard, paper, pens
-

The Safety Officer is a member of the Incident Command Staff.

Responsibilities: The Safety Officer ensures that all activities are conducted in as safe a manner as possible under the existing circumstances.

Start Up Actions

- ❑ Check in with Incident Commander for situation briefing.
- ❑ Put on personal safety equipment; i.e., hard hat, vest)
- ❑ Obtain necessary equipment and supplies from Logistics.
- ❑ Open and maintain a position log. Maintain all required records and documentation to support the history of the emergency or disaster. Document:
 - Messages received
 - Action taken
 - Decision justification and documentation
 - Requests filled

Operational Duties

- ❑ Monitor drills, exercises, and emergency response activities for safety.
- ❑ Identify and mitigate safety hazards and situations.
- ❑ Stop or modify all unsafe operations.
- ❑ Ensure that responders use appropriate safety equipment.
- ❑ Think ahead and anticipate situations and problems before they occur.
- ❑ Anticipate situation changes, such as severe aftershocks, in all planning.
- ❑ Keep the Incident Commander advised of your status and activity and on any problem areas that now need or will require solutions.

Closing Down

- ❑ When authorized by IC, deactivate the unit and close out all logs. Provide logs and other relevant documents to the Documentation Unit.
- ❑ Return equipment and reusable supplies to Logistics.

Equipment/ Supplies

- Vest
 - Clipboard, paper, pens
 - Hard hat
 - Two-way radio
-

INCIDENT COMMAND SYSTEM PLANNING/INTELLIGENCE

Responsibilities: Planning/Intelligence is responsible for the collection, evaluation, documentation and use of information about the development of the incident, the status of resources, and recovery planning.

- ❑ Maintain accurate records and site map.
- ❑ Provide ongoing analysis of situation and resource status.

Start Up Actions

- ❑ Check in with Incident Commander for situation briefing.
- ❑ Obtain necessary equipment and supplies from Logistics.
- ❑ Put on position identifier, such as vest, if available.

Operational Duties

- ❑ Assume the duties of all Planning/Intelligence positions until staff is available and assigned.
- ❑ As (or if) staff is assigned, brief them on the situation and supervise their activities, utilizing the position checklists.
- ❑ Assist Incident Commander in writing Action Plans.

Closing Down

- ❑ At the Incident Commander's direction, deactivate the section and close out all logs.
- ❑ Verify that closing tasks of all Planning/Intelligence positions have been accomplished.
- ❑ Return equipment and reusable supplies to Logistics.

Equipment/ Supplies

- | | |
|---------------------------------------|------------------|
| ▪ Vest | • Hard hat |
| ▪ Clipboard, paper, pens | • Two-way radio |
| ▪ Paper, pens | • Dry-erase pens |
| ▪ File box(es) | • Clipboard |
| ▪ Tissues | |
| ▪ Large site map of campus, laminated | |
| ▪ Forms: | |
| - Emergency Time/Situation Report | |
| - Sample log | |
| - Student Accounting Form | |

Responsibilities: Operations manages the on-scene, immediate response to the disaster, which can include the following:

- Site Facility Check/Damage Assessment
- Security and Utilities
- Search & Rescue
- Student Release
- Fire Suppression
- Medical

Start-up Actions

- ❑ Check in with Incident Commander or Command Post for situation briefing.
- ❑ Put on personal safety equipment, e.g. hard hat and vest, walkie-talkie.
- ❑ Obtain necessary equipment and supplies from Logistics.
- ❑ Search facility to ensure safe evacuation route for students.
- ❑ Identify an assistant.
- ❑ Be proactive. Anticipate needs.

Operational Duties

- ❑ Assume the duties of all operations positions until staff is available and assigned.
- ❑ As staff is assigned, brief them on the situation and supervise their activities, utilizing the position checklists.
- ❑ Coordinate Search and Rescue operations.
- ❑ Check with IC to make sure Emergency Plan is implemented
- ❑ If additional supplies or staff are needed for the Operations Section, notify Logistics. When additional staff arrive, brief them on the situation, and assign them as needed.
- ❑ As information is received from Operations staff, pass it on to the Incident Commander.
- ❑ Inform the Incident Commander regarding tasks and priorities.
- ❑ Student Release is a major effort and will require heavy staffing, so begin preparations early for well-separated and well-marked Parent Request and Student Release gates.
- ❑ Make sure that Operations staff are following standard procedures, utilizing appropriate safety gear, and documenting their activities.
- ❑ Schedule breaks and reassign Operations staff within the section as needed.

Closing Down

- ❑ At the Incident Commander's direction, release Operations staff no longer needed. Direct staff members to sign out through Timekeeping.
- ❑ Return equipment and reusable supplies to Logistics.
- ❑ When authorized by Incident Commander, deactivate the section and close out all logs.
- ❑ Provide logs and other relevant documents to the Documentation Unit.

Equipment/Supplies

- Vest
 - Search & Rescue equipment
 - Clipboard, paper, pens, tape
 - Hard hat, gloves
 - Two-way radio
 - Campus map
-

Responsibilities: Logistics is responsible for providing facilities, services, personnel, equipment, and materials in support of the incident.

Start-up Actions

- ❑ Check in with Incident Commander for situation briefing.
- ❑ Open supplies container or other storage facility.
- ❑ Put on position identifier, such as vest.
- ❑ Begin distribution of supplies and equipment as needed.
- ❑ Ensure that the Incident Command Post and other facilities are set up as needed.

Operational Duties

- ❑ Assume the duties of all Logistics positions until staff is available and assigned.
- ❑ As (or if) staff is assigned, brief them on the situation and supervise their activities, utilizing the position checklists.
- ❑ Coordinate supplies, equipment, and personnel needs with the Incident Commander
- ❑ Maintain security of cargo container, supplies and equipment.

Closing Down

- ❑ At the Incident Commander's direction, deactivate the section and close out all logs.
- ❑ Verify that closing tasks of all Logistics positions have been accomplished. Secure all equipment and supplies.

Equipment/Supplies

- Vest
- Clipboards with volunteer sign-in sheets
- Cargo container or other storage facility and all emergency supplies stored on campus
- Forms:
 - Inventory of emergency supplies on campus
 - Site Status Report
 - Communications log
 - Message forms
- Hard hat
- Pens, marking pens

INCIDENT COMMAND SYSTEM ADMINISTRATION/FINANCE

Responsibilities: Finance/Administration is responsible for financial tracking, procurement, and cost analysis related to the disaster or emergency.

- Maintain financial records
- Track and record staff hours.

Start-Up Actions

- ❑ Check in with Incident Commander for situation briefing.
- ❑ Put on position identifier, such as vest.
- ❑ Locate and set up work space.
- ❑ Check in with the Documentation Clerk to collect records and information which relate to personnel time keeping and/or purchasing.

Operational Duties

- ❑ Assume the duties of all Finance/Administration positions until staff is available and assigned.
- ❑ As (or if) staff is assigned, brief them on the situation and supervise their activities, utilizing the position checklists.

Closing Down

- ❑ At the Incident Commander's direction, deactivate the section and close out all logs.
- ❑ Verify that closing tasks of all Finance/Administration positions have been accomplished. Secure all documents and records.

Equipment/ Supplies

- Vest
- Paper, pens
- Forms:
 - Staff Duty Log
- Clipboard

DISTRICT SUPPORT TEAM

The District Support Team's role is to support the school when the need exceeds the resources of the school to handle a situation:

- PROVIDE guidance regarding questions that may arise.
- DIRECT additional support personnel, including District Support Team members as needed.
- MONITOR the emergency situation and facilitate major decisions which need to be made.
- IDENTIFY a district contact for release of information to the media.

SCHOOL EMERGENCY TEAMS

There is no way a single principal or assistant principal can manage the many aspects associated with a critical event. Principals must rely on other key school personnel to perform tasks that will ensure the safety of students and other school personnel during a crisis or critical incident. The ICS uses a team approach to deal with situations. This team cannot be put together when the crisis or critical incident is unfolding. Each role must be pre-assigned and each member must be familiar with his or her responsibilities long before an emergency or critical incident occurs.

The School Emergency Teams are organized to support the following functions:

- DEVELOP the school's Emergency Management Plan including school-specific risks, assets, and needs, using the district model as a guide;
- CONDUCT or coordinate orientation training for staff and recommend additional training;
- CONDUCT or coordinate awareness programs for students;
- EVALUATE the school's preparedness for implementing SEMS/NIMS and response procedures;
- COORDINATE and IMPLEMENT specific responses during and after an emergency;
- REPORT progress to the school's school based council, parents, and superintendent.

The following is an outline of general roles and responsibilities for staff during an emergency. In addition, each Emergency Team has its own assigned roles during an emergency, which are described more fully later in this section.

Principal/Facility Director: The principal serves as Incident Commander and is responsible for the overall direction of the emergency procedures at the school or support building site. Responsibilities include:

- Assume overall direction of all emergency procedures based on actions and procedures outlined in this Emergency Management Plan.
 - Take steps deemed necessary to ensure the safety of students, staff, and other individuals.
-

- ❑ Determine whether to implement emergency protocols (Evacuation; Reverse Evacuation; Shelter in Place; Drop, Cover and Hold-on; Lockdown, etc., more fully described in **Section III - Response**).
- ❑ Arrange for transfer of students, staff, and other individuals when safety is threatened by a disaster.
- ❑ Work with emergency service personnel (depending on the incident, community agencies such as police or fire department may have jurisdiction for investigations, rescue procedures, etc.).
- ❑ Maintain a line of communication with the Superintendent's Office and/or District Support Team.

Staff: Per California Government Code §3100, during a disaster, public employees become "Disaster Service Workers". As Disaster Service Workers, school staff may be required to remain at school to assist in an emergency situation.

Teachers: Teachers shall be responsible for the supervision of students and shall remain with students until directed otherwise. They shall:

- ❑ Supervise students under their charge.
- ❑ Take steps to ensure the safety of students, staff, and other individuals in the implementation of emergency protocols.
- ❑ Direct students in their charge to inside or outside assembly areas, in accordance with signals, warning, written notification, or intercom orders according to established emergency procedures.
- ❑ Give appropriate action command during an emergency.
- ❑ Take attendance when class relocates to an outside or inside assembly area or evacuates to another location.
- ❑ Report missing students to the Incident Commander/Principal.
- ❑ Assist as directed by the principal.
- ❑ Send students in need of first aid to school nurse or person trained in first aid. Arrange for first aid for those unable to be moved.
- ❑ Render first aid if necessary. School staff should be trained and certified in First Aid and CPR.

Instructional Aides/Assistants:

- ❑ Assist teacher, as directed.

Counselors, Social Workers, Psychologists: Counselors, social workers, psychologists provide assistance with the overall direction of the emergency procedures at the site. Responsibilities may include:

- ❑ Take steps to ensure the safety of students, staff, and other individuals in the implementation of emergency protocols.
 - ❑ Direct students in their charge according to established emergency protocols.
 - ❑ Render first aid if necessary.
 - ❑ Assist in the transfer of students, staff and other individuals when their safety is threatened by a disaster.
-

- ❑ Maintain a line of communication with the Emergency Management Team leader.
- ❑ Assist as directed by the principal.

School Nurses/Health Assistants:

- ❑ Administer first aid or emergency treatment as needed.
- ❑ Supervise administration of first aid by those trained to provide it.
- ❑ Organize First Aid and medical supplies.

Custodians/Maintenance Personnel:

- ❑ Survey and report building damage to principal.
- ❑ Control main shut-off valves for gas, water, and electricity and assure that no hazard results from broken or downed lines.
- ❑ Provide damage control as needed.
- ❑ Assist in the conservation, use, and disbursement of supplies and equipment.
- ❑ Keep Incident Commander/Principal informed of condition of school.

School Secretary/Office Staff

- ❑ Answer phones and assist in receiving and providing consistent information to callers.
- ❑ Provide for the safety of essential school records and documents.
- ❑ Assist as directed by the principal. Provide assistance to principal.
- ❑ Monitor radio emergency broadcasts.
- ❑ Assist with health emergencies as needed, acting as messengers, etc.

Food Service/Cafeteria Workers

- ❑ Use, prepare, and serve food and water on a rationed basis whenever the feeding of students and staff becomes necessary during an emergency.
- ❑ Assist as directed by the principal.

Bus Drivers

- ❑ Supervise the care of children if disaster occurs while children are in bus.
- ❑ Transfer students to new location when directed.
- ❑ Assist custodian in damage control.
- ❑ Transport individuals in need of medical attention.

Other Staff:

- ❑ Report to principal for directions.
-

EMERGENCY TEAM MEMBERSHIP: The Emergency Teams should reflect the diversity of the school community and capitalize on the unique training and expertise offered by staff in various positions in the school. Team members may include:

<ul style="list-style-type: none"> • Principal • Counselors • Nurses • Maintenance director, custodians • Office secretaries • Teachers • Vocational education teachers • School security and law enforcement personnel • School psychologist • Social workers • Transportation coordinator 	<ul style="list-style-type: none"> ▪ Special education teachers ▪ Transportation coordinator ▪ Cafeteria Manager <p><i>Also, community representatives such as:</i></p> <ul style="list-style-type: none"> ▪ Police, Fire, Emergency Medical personnel ▪ Social Service workers (Child Welfare, Juvenile Justice) ▪ Mental Health workers ▪ Clergy ▪ Parents
--	---

These persons shall receive training and shall be required to participate in a number of "emergency readiness" activities before an actual disaster occurs, in order to be fully prepared to respond both during and after the emergency. NOTE: Any school employee, as a disaster services worker, may be asked to assist an Emergency Team whenever necessary.

TEAM LEADER RESPONSIBILITIES: Ongoing responsibilities of the Team Leader include the following:

- REQUEST the principal or designee to fill any vacancies on the team;
- ARRANGE for the training of new members and alternates;
- ENSURE that necessary supplies and equipment are maintained;
- RECOMMEND purchase of necessary supplies and equipment to the principal or designee;
- CONDUCT annual meetings with team members to validate or update procedures;
- ATTEND annual meetings with other team leaders and the principal or designee;
- DETERMINE where and under what conditions the team will meet during emergencies;
- COORDINATE team activities during actual emergencies.

EMERGENCY TEAM ACTIVITIES: The Emergency Teams should be assigned to cover the following activities. One staff member may be assigned to more than a single activity, as needed:

- | | |
|--|--|
| <ul style="list-style-type: none"> • Emergency Operations Center (EOC) • Search and Rescue • Medical • Communications • Situation Analysis • Student Care • Student Release | <ul style="list-style-type: none"> • Staffing • Supplies/Facilities Management • Documentation • Timekeeping • Purchasing • Morgue |
|--|--|

EMERGENCY TEAMS

SEARCH AND RESCUE

Objectives: Sweep quickly through the school buildings to identify location of trapped or injured students and staff. Rescue those who are trapped and injured. Coordinate with Medical team for treatment of the injured.

Safety Rules: Buddy system: 2-3 persons per team; team leader identified. Take no action that might endanger you. Do not work beyond expertise. Use appropriate safety gear. Size up the situation first. Follow all operational and standard safety procedures.

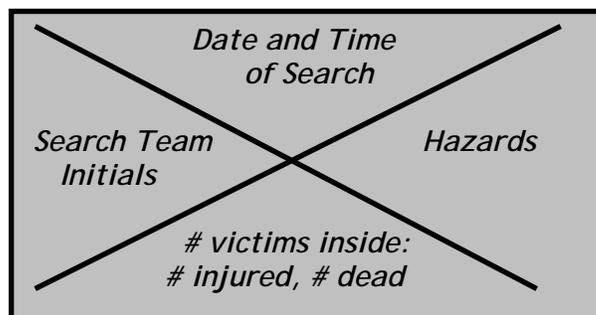
Start-Up Actions

- ❑ Put on personal safety gear.
- ❑ Obtain all necessary equipment from container (see below).
- ❑ Check at Command Post (ICP) for assignment.
- ❑ Put batteries in flashlight.

Operational Duties

- ❑ Before entering a building, walk around and inspect complete exterior of building. Report structural damage to team leader. Use yellow caution tape to barricade hazardous areas. Do not enter severely damaged buildings.
- ❑ If building is safe to enter, search assigned area (following map) using orderly pattern. Check all rooms. Use chalk, painters' tape or grease pencil to mark slash on door (/) when entering a room.
- ❑ When injured victim is located, transmit location, number, and condition of injured to Command Post. Do not use names of students or staff. Transport injured to First Aid.
- ❑ After searching a room, draw a second slash (\), creating an "X" on the door when the primary search is completed.
- ❑ Fill in the four quadrants of the "X" using the standard marking system, which will help professional rescue teams who follow. In the top quadrant, write date and time of search. In left quadrant, note the search team name or initials. In right quadrant, list structure hazards and bottom quadrant write the number of victims still in the room (number injured and number dead). If the room is clear, write "O".

Standard Search and Rescue door marking



- ❑ Report by radio to Incident Command Post when room or area has cleared (example: "*Room A-123 is clear*"). To diminish radio clutter, consider reporting room clusters as clear.
-

- ❑ Follow directions from Incident Command Post
- ❑ Report gas leaks, fires, or structural damage to Incident Command Post immediately upon discovery.
- ❑ Record exact location of damage and triage on map and report information to Incident Commander
- ❑ Keep radio communication brief and simple. No codes.

Closing Down

- ❑ Return equipment to Logistics. Provide maps and logs to the Documentation Unit.

Equipment/Supplies

- ID Vest
- Work and non-latex gloves
- First aid backpack
- Clipboard with job description and map
- Fire extinguisher
- Backpack with goggles, flashlight, face masks, pry bar, duct tape, grease pencil and painter's tape to mark doors.
- Hard hat
- Whistle with master keys on lanyard
- Campus 2-way radio
- Caution tape

* **Remember:** If you are not acknowledged, you have not been heard. Repeat your transmission, being aware of other simultaneous transmissions.

Objectives: Establish the First Aid treatment area, triage, emergency medical response and counseling. Ensure that appropriate actions are taken in the event of deaths. Coordinate with the Search and Rescue Team and inform the Operations Chief or Incident Commander when the situation requires health or medical services that staff cannot provide.

Personnel: First-aid trained staff and volunteers

Start-Up Actions

- ❑ Obtain and wear personal safety equipment including non-latex or nitrile gloves.
- ❑ Check with Medical Team Leader for assignment.

Operational Duties

- ❑ Administer appropriate First Aid.
- ❑ Keep accurate records of care given.
- ❑ Continue to assess victims at regular intervals.
- ❑ Report deaths immediately to Medical Team Leader.
- ❑ If and when transport is available, do final assessment and document on triage tag. Keep and file records for reference—do not send with victim.
- ❑ A copy of the Student's Emergency Card must accompany student removed from campus to receive advanced medical attention. Send emergency out-of-area phone number if available.

First Aid Stations

Triage - Locate triage (injury sorting area) at the entry of the First Aid Station. This area is for the injured to be quickly evaluated for severity of injury and directed to the appropriate treatment area.

Minor Care - Avoids overloading first aid station for those needing immediate care.

Immediate Care - For people with life and limb threatening injuries that require immediate attention, such as difficulty breathing, severe bleeding, major burns and shock. Locate immediate care in an area out of sight of most students and staff but accessible to emergency vehicles.

Delayed Care - For injured individuals who do not require attention within the first hour. Such people may have lacerations, broken bones, wounds beyond a teacher's capabilities to handle, or need medication. Locate near the immediate care area, but shield from the sight of the injured in immediate care area.

Crisis Counseling - Mild to moderate anxiety is best handled by teachers in class groups. Severe anxiety warrants special attention in a secluded area away from other First Aid areas, since the sight of injured people may worsen the hysteria. This area should be away from the student population because hysteria can rapidly get out of control.

Closing Down

- ❑ Return equipment and unused supplies to Logistics.
- ❑ Clean up first aid area. Dispose of hazardous waste safely.
- ❑ Complete all paperwork and turn into the Documentation Unit.

Equipment/ First Aid Supplies: See Emergency Supplies Inventory in **APPENDIX G**.

EMERGENCY TEAMS

COMMUNICATIONS

Objectives: Establish, coordinate and direct verbal and written communications within the school disaster site and with the school district. If the school district cannot be contacted, communications may be made with outside agencies when necessary.

Personnel: School staff member with campus two way radio, supported by student or disaster volunteer runners, and disaster volunteer who is a qualified amateur radio operator.

Start-Up Actions

- ❑ Set up Communications station in a quiet location with access to the Incident Command Post
- ❑ Turn on radios and advise Incident Commander when ready to accept traffic.

Operational Duties

- ❑ Communicate with district EOC per district procedure. At the direction of the Incident Commander, report status of students, staff, and campus, using Site Status Report Form.
- ❑ Receive and write down all communications from the district EOC.
- ❑ Use runners to deliver messages to the Incident Commander with copies to the Planning/Intelligence Chief.
- ❑ Maintain Communications Log: date/time/originator/recipient
- ❑ Follow communications protocol. Do not contact the city directly if the district EOC is available.
- ❑ Direct the media or the public to the Public Information Officer.
- ❑ Monitor AM/FM radio for local emergency news.

Closing Down

- ❑ Close out all logs, message forms, etc. and turn them over to Documentation.
- ❑ Return all equipment and unused supplies to Logistics.

Equipment/ Supplies

- ID Vest
 - 2-way radios with spare batteries for each
 - paper, pens
 - AM/FM solar/battery/crank radio
 - Tote tray for outgoing messages
 - Forms:
 - Site Status Report
 - Message forms
 - Hard hat
 - Clipboard
 - Table and chairs
 - File boxes,
-

EMERGENCY TEAMS

SITUATION ANALYSIS

Objectives: Collect, evaluate, document and use information about the development of the incident and the status of resources.

- Maintain accurate site map.
- Provide ongoing analysis of situation and resource status.

Start-up Actions

- ❑ Check in with Planning/Intelligence Chief for situation briefing.
- ❑ Obtain necessary equipment and supplies from Logistics.
- ❑ Put on position identifier, such as vest, if available.

Operational Duties

Situation Status (Map)

- ❑ Collect, organize and analyze situation information.
- ❑ Mark site map appropriately as related reports are received. This includes but is not limited to Search and Rescue reports and damage updates, giving a concise picture status of campus.
- ❑ Preserve map as legal document until photographed.
- ❑ Use area-wide map to record information on major incidents, road closures, utility outages, etc. (This information may be useful to staff for planning routes home, etc.)

Situation Analysis

- ❑ Provide current situation assessments based on analysis of information received.
- ❑ Develop situation reports for the Command Post to support the action planning process.
- ❑ Think ahead and anticipate situations and problems before they occur
- ❑ Report only to Incident Commander. Refer all other requests to Public Information Officer.

Closing Down

- ❑ Close out all logs and turn all documents into Documentation.
- ❑ Return equipment and reusable supplies to Logistics.

Equipment/ Supplies

- ID Vest
 - 2-way radio
 - Large site map of campus, laminated
 - Map of county and local area
 - Clipboards
 - Paper, pens, dry-erase pens, tissues
 - File box(es)
-

EMERGENCY TEAMS

STUDENT CARE

Objectives: Ensure the care and safety of all students on campus except those who are in the Medical Treatment Area.

Personnel: Classroom teachers, substitute teachers, and staff as assigned.

Start Up Actions

- ❑ Wear identification vest.
- ❑ Assess situation. Remain calm.
- ❑ Take job description clipboard and radio.
- ❑ Check in with Operations Chief for situation briefing.
- ❑ Assign personnel to assignments as needed.
- ❑ If school is evacuating:
 - Verify that the assembly area and routes to it are safe.
 - Count students or observe the classrooms as they exit, to make sure that all classes evacuate.
 - Initiate the set-up of portable toilet facilities and hand-washing stations.

Operational Duties

- ❑ Monitor the safety and well-being of the students and staff in the Assembly Area.
- ❑ Administer minor first aid as needed.
- ❑ Support the Student Release process by releasing students with appropriate paperwork.
- ❑ When necessary, provide water and food to students and staff.
- ❑ Make arrangements for portable toilets if necessary, ensuring that students and staff wash their hands thoroughly to prevent disease.
- ❑ Make arrangements to provide shelter for students and staff.
- ❑ Arrange activities and keep students reassured.
- ❑ Update records of the number of students and staff in the assembly area (or in the buildings).
- ❑ Direct all requests for information to the Public Information Officer or Command Post.

Closing Down

- ❑ Return equipment and reusable supplies to Logistics.
- ❑ When authorized by the Incident Commander, close out all logs. Provide logs and other relevant documents to the Documentation Unit.

Equipment/ Supplies

- ID Vest
 - Clipboard with job description
 - First aid kit, water, food, sanitation supplies
 - Student activities: books, games, coloring books, etc.
 - Forms:
 - Student Accounting
 - Student Injury Forms
 - School 2-way radio
 - Ground cover, tarps
-

EMERGENCY TEAMS

STUDENT RELEASE

Objective: Assist teachers and staff in the release of students from the campus to parents and designated adults.

Personnel: School Secretary, available staff and disaster volunteers. Use buddy system. Student Release process is supported by student runners.

Start-Up Actions:

- Put on vest or position identifier.
- Check with Operations Chief for assignment to Request Table or Release Table.
- Obtain necessary equipment and forms from Logistics.
- Secure area against unauthorized access. Mark gates with signs.
- Set up Request Table at the main student access area. Use alphabetical grouping signs to organize parent requests.
- Have Student Release Forms available for parents outside at Request Table. Assign volunteers to assist.
- Set up Release Table at some distance from Request Table.

Operational Duties

- Follow procedures outlined below to ensure the safe reunification of students with their parents or guardians.
- Refer all requests for information to the Public Information Officer. Do not spread rumors!
- If volunteers arrive to help, send those with photo ID. to Logistics.

Procedures

- Requesting adult fills out Student Release Form, gives it to staff member, and shows photo identification.
- Staff verifies identification, pulls Emergency Card from file, and verifies that the requester is authorized on the card.
- Staff instructs the requester to proceed to the Release Table and files the Emergency Card in the out box. .
- Runner takes the Student Release Form to Student Assembly Area, walks the requested student to the Student Release Table.
- Staff matches student to requester, asks parent/requester to sign student Release Form, and requests both to leave the campus area to reduce congestion.

Note: If a parent is hostile or refuses to wait in line, don't argue. Step aside with the agitated parent so that Request Table can continue processing other parent requests.

If student is with class in the Assembly Area:

- Runner shows Student Release Form to the teacher
 - Teacher marks box, "Sent with Runner."
 - Runner walks student to Release Table
 - Runner hands paperwork to release personnel.
 - Release staff match student to requester, verify proof of identification
-

If student is not with the class:

- ❑ Teacher makes appropriate notation on Student Release Form:
- ❑ "Absent" if student was not in school that day.
- ❑ "First Aid" if student is in Medical Treatment Area.
- ❑ "Missing" if student was in school but now cannot be located.
- ❑ Runner takes Student Release Form to Incident Commander.
- ❑ Incident commander verifies student location if known and directs runner accordingly.
- ❑ Parent should be notified of missing student status and escorted to Crisis Counselor.
- ❑ If student is in First Aid, parent should be escorted to Medical Treatment Area.
- ❑ If student was marked absent, parent will be notified by a staff member.

Closing Down

- ❑ At the direction of the Operations Chief, return equipment and unused supplies to Logistics.
- ❑ Complete all paperwork and turn into the Documentation Unit.

Equipment/Supplies - See Emergency Supplies (Student Release File Box inventory) in **APPENDIX G.**

- ID Vest
- Small clipboards for Parent Request forms
- Student Emergency Contact Cards
- Signs marked Request Table and Release Table
- Signs for alphabetical grouping to organize request lines
- Post-it tabs to indicate absent students, missing students, those in First Aid.
- Map with location of Student Release Table and parent parking area
- Forms:
 - Student Release Form (copies for every student)
- Clipboards for staff
- Pens, stapler
- File boxes to serve as out-boxes

Objective: Coordinate the assignment of personnel (staff, students, disaster volunteers) in support of the incident response.

Start-Up Actions

- ❑ Check in with Logistics Chief for situation briefing.
- ❑ Put on position identifier, such as vest.
- ❑ Open three logs to list staff, volunteers, and students who are awaiting assignment.

Operational Duties

- ❑ Deploy personnel as requested by the Incident Commander.
- ❑ Sign in volunteers, making sure that volunteers are wearing their I.D. badges and are on the site disaster volunteer list.
- ❑ Unregistered volunteers should be sent to the community volunteer site, if there is one. If needed on site, verify identity, register volunteer, and consider simple assignments such as parking and crowd control, distribution of Student Request forms to parents.

Closing Down

- ❑ Ask volunteers to sign out.
- ❑ At the Logistic Chief's direction, close out all logs and turn them in to Documentation Unit.
- ❑ Return all equipment and supplies.

Equipment/Supplies

- ID Vest
- Clipboards with Volunteer Sign-in sheets
- Cargo container or other storage facility and all emergency supplies stored on campus
- Forms:
 - Inventory of emergency supplies on campus
 - List of registered disaster volunteers
- 2-way radio
- Paper, Pens

EMERGENCY TEAMS

SUPPLIES/FACILITIES

Objectives: Provide facilities, equipment, supplies, and materials in support of the incident response. Facilitate and coordinate food supplies, meal preparation, meal distribution, water distribution and sanitation set-up.

Start-Up Actions

- ❑ Check in with Logistics Chief for situation briefing.
- ❑ Open supplies container or other storage facility if necessary.
- ❑ Put on position identifier, such as vest.
- ❑ Begin distribution of supplies and equipment as needed.
- ❑ Set up the Incident Command Post.

Operational Duties

- ❑ Maintain security of cargo container, supplies and equipment.
- ❑ Distribute supplies and equipment as needed.
- ❑ Assist team members in locating appropriate supplies and equipment.
- ❑ Set up Staging Area, Sanitation Area, Feeding Area, and other facilities as needed.

Closing Down:

- ❑ At the Logistic Chief's direction, receive all equipment and unused supplies as they are returned.
- ❑ Secure all equipment and supplies.

Equipment/Supplies

- ID Vest
- Clipboard
- Cargo container or other storage facility and all emergency Supplies stored on campus
- Forms:
 - Inventory of emergency supplies on campus
- 2-way radio
- Paper, pens

Objectives: Collection, evaluation, documentation and use of information about the development of the incident and the status of resources.

Start-Up Actions

- ❑ Check in with Planning/Intelligence Chief for situation briefing.
- ❑ Obtain necessary equipment and supplies from Logistics.
- ❑ Put on position identifier, such as vest.
- ❑ Determine whether there will be a Finance/Administration Section. If there is none, the Documentation Clerk will be responsible for maintaining all records of any expenditures as well as all personnel time keeping records.

Operational Duties

Records

- ❑ Maintain time log of the Incident, noting all actions and reports. (See sample log in **APPENDIX D.**)
- ❑ Record content of all radio communication with district Emergency Operations Center.
- ❑ Record verbal communication for basic content.
- ❑ Log in all written reports.
- ❑ File all reports for reference (file box).
Important: A permanent log may be typed or rewritten at a later time for clarity and better understanding. Keep all original notes and records—they are legal documents.

Student and Staff Accounting

- ❑ Receive, record, and analyze Student Accounting forms.
- ❑ Check off staff roster. Compute number of students, staff, and others on campus for Situation Analysis. Update periodically.
- ❑ Report missing persons and site damage to Incident Commander.
- ❑ Report first aid needs to Medical Team Leader.
- ❑ File forms for reference.

Closing Down

- ❑ Collect and file all paperwork and documentation from deactivating sections.
- ❑ Securely package and store these documents for future use.
- ❑ Return equipment and reusable supplies to Logistics.

Equipment/ Supplies

- ID Vest
 - 2-way radio paper, pens
 - Forms:
 - Emergency Time/Situation Report
 - Sample log
 - Student Accounting Form
 - Clipboards
 - File box(es)
-

EMERGENCY TEAMS

TIMEKEEPING

Objective: Maintenance of accurate and complete records of staff hours.

Start-Up Actions:

- ❑ Check in with Finance/Administration Chief for situation briefing.
- ❑ Put on position identifier, such as vest, if available.
- ❑ Locate and set up work space.
- ❑ Check in with the Documentation Clerk to collect records and data that relate to personnel time keeping.

Operational Duties

- ❑ Meet with Finance/Administration Chief to determine process for tracking regular and overtime of staff.
- ❑ Ensure that accurate records are kept of all staff members, indicating hours worked.
- ❑ If district personnel not normally assigned to the site are working, be sure that records of their hours are kept.

Closing Down

- ❑ Close out all logs.
- ❑ Secure all documents and records.

Equipment/ Supplies

- ID Vest
- Paper, pens
- Forms:
 - Staff Duty Log
- Clipboards

Objective: Maintain accurate and complete records of purchases. Most purchases will be made at the district level; however, in emergency situations, it may be necessary for school sites to acquire certain items quickly.

Start-Up Action

- ❑ Check in with Finance/Administration Chief for situation briefing.
- ❑ Put on position identifier, such as vest.
- ❑ Locate and set up work space.
- ❑ Check in with the Documentation Clerk to collect records and information which relate to purchasing.

Operational Duties

- ❑ Meet with Finance/Administration Chief to determine process for tracking purchases.
- ❑ Support Logistics in making any purchases that have been approved by the Incident Commander.

Closing Down

- ❑ Close out all logs.
- ❑ Secure all documents and records.

Equipment/Supplies

- ID Vest
- Paper, Pens
- Stapler
- Clipboard
- Post-Its

Personnel: To be assigned by the Operations Chief, if needed.

Start-Up Actions

- ❑ Check with Operations Chief for direction.
- ❑ If directed, set up morgue area. Verify:
 - Tile, concrete, or other cool floor surface
 - Accessible to Coroner's vehicle
 - Remote from assembly area; Keep unauthorized persons out of morgue.
 - Maintain respectful attitude.

Operational Duties - After pronouncement or determination of death:

- ❑ Confirm that the person is actually dead.
- ❑ Do not move the body until directed by Command Post.
- ❑ Do not remove any personal effects from the body. Personal effects must remain with the body at all times.
- ❑ As soon as possible, notify Operations Chief, who will notify the Incident Commander, who will notify 911 of the location and, if known, the identity of the body. The 911 Dispatcher will notify the Coroner.
- ❑ Keep accurate records and make available to law enforcement and/or the Coroner when requested.
- ❑ Write the following information on two tags.
 - Date and time found.
 - Exact location where found.
 - Name of decedent if known.
 - If identified—how, when, by whom.
 - Name of person filling out tag.
- ❑ Attach one tag to body.
- ❑ If the Coroner's Office will not be able to pick up the body soon, place body in plastic bag(s) and tape securely to prevent unwrapping. Securely attach the second tag to the outside of the bag. Move body to morgue.
- ❑ Place any additional personal belongings found in a separate container and label as above. Do not attach to the body—store separately near the body.

Closing Down

- ❑ After all bodies have been picked up, close down the Morgue.
- ❑ Return equipment and unused supplies to Logistics.
- ❑ Clean up area. Dispose of hazardous waste safely.
- ❑ Complete all paperwork and turn into the Documentation Unit.

Equipment/ Supplies

- ID Vest
 - Vicks VapoRub
 - Plastic tarps
 - Stapler
 - 2" cloth tape
 - Tags
 - Pens/Pencils
 - Plastic trash bags
 - Duct tape
-

EMERGENCY TEAM TOOLBOX: Assemble and update annually a “toolbox” for each team to be used during an emergency items in the toolbox should not be used for any other purpose except emergency preparedness training activities. Store the items in a clear, portable plastic box that is readily accessible. Label the toolbox with the name of the team and the date its contents were last updated (e.g., batteries replaced, phone numbers checked).

Suggested items to include for most teams:

- ❑ Management Plan with organizational chart, chain of command
- ❑ Map of buildings with location of exits, phones, turn-off valves, first-aid kits and assembly areas
- ❑ Blueprints of school buildings, including utilities
- ❑ Map of local streets with evacuation route marked
- ❑ Flashlights with extra batteries
- ❑ First aid kit
- ❑ Latex-free gloves
- ❑ First aid manual
- ❑ Space blankets
- ❑ Faculty/staff roster
- ❑ Student roster (including emergency contacts for parents)
- ❑ Two-way radios or cellular phones
- ❑ Solar/battery-powered radio and spare batteries
- ❑ White board with dry erase markers
- ❑ Adhesive stickers and markers for name tags
- ❑ Orange vests and hard hats to identify key personnel
- ❑ List of key emergency phone numbers
- ❑ Black markers, ball point pens and note pads
- ❑ Face masks

C. COMMUNICATIONS

Establishing reliable communication networks is critical for dealing effectively with an emergency or crisis. Timely contact with law enforcement and other public agencies is necessary for effective response. School staff members and students must be told what is happening and what to do. Parents and families of staff members must be informed about the situation, including the status of their child or family member. School Board members must be kept informed and updated. Information must be transmitted to the District Superintendent and to other affected schools. Rumors must be quelled. And finally, the media must be informed and kept updated. It is the responsibility of the superintendent to disseminate information to the public.

As a part of the countywide Marin Schools Emergency Radio Network, the principal or designee will:

- Notify the district office of the school's status/needs. The district office will notify The Marin County Office of Education of the status of all district schools.
 - Designate staff member(s) to monitor all communications
-

COMMON TERMINOLOGY

One of the most important reasons for schools to use Incident Common System is that it provides common terminology. Response agencies will communicate more effectively with schools if similar roles are described with similar wording.

COMMUNICATION TECHNOLOGY

During an emergency, telephones and cell phones will only be used to report emergency conditions or to request emergency assistance. In the event that telephone and/or electrical service is interrupted, other means must be relied upon to relay information. A bullhorn and/or runners will be utilized within the school building and on school grounds.

COMMUNICATION TOOLS

Standard telephone – A standard telephone plugged into a standard jack may work even when the electrical power is off. Designate a school telephone number as a recorded “hot line” for parents to call for information during emergencies. The goal is to keep other telephone lines free for communication with first responders and others.

Cellular telephones – These phones may be the only tool working when electric service is out; they are useful to administrators and staff who may be en route to or from a site.

Intercom systems – Ideally, systems should include teacher-initiated communications with the office using a handset rather than a wall-mounted speaker.

Bullhorns and megaphones – A battery-powered bullhorn or megaphone should be part of the school’s emergency toolbox to address students and staff who are assembling outside the school. Procedures governing storage and use will help ensure readiness for use.

Two-way radio - Two-way radios provide a reliable method of communication between rooms and buildings at a single site. Train all staff fully to operate the two-way radio.

Computers – A wireless laptop computer may be used for communication both within the school and to other sites. E-mail may be a useful tool for updating information for staff, other schools in an affected area, and the District Superintendent. Post information such as school evacuation, closure or relocation on the home page of the school and district website.

Fax machines – Possible uses include an off-campus accidents where lists of students and staff members involved, their locations, and needed telephone numbers can be quickly and accurately communicated. Medical information, release forms, and authorizations can be faxed and returned in emergencies.

Alarm systems – Bells or buzzers which may be sounded in different ways to signal different types of emergencies - for example, fire, lockdown or special alert (with instructions to follow).

TELEPHONE TREE

A telephone tree is a simple, widely used system for notifying staff of an emergency event when they are not at school. Set up a telephone tree by listing the first in Chain of Command (Principal or Incident Commander). Then link him/her to several on the Emergency Management Team; then link to different staff groupings (teachers,

support staff, etc.). In practice, the first person on the list calls several people, who in turn call others, etc., until everyone on the list has been notified of the situation. A carefully crafted statement, specifying what is and is not yet known, and what steps may need to be taken, should be drafted before the telephone tree is activated.

COMMUNICATING WITH PARENTS

An important aspect of managing emergencies is dealing effectively with parent reactions and community agencies. Communication with parents and the community is best begun before an emergency occurs. Some useful strategies include the following:

- ❑ Develop a relationship with parents so that they trust and feel comfortable calling school personnel in the event of emergency.
- ❑ Inform parents about the school's emergency plan, its purpose and objectives. Provide such information can be included in a school newsletter or informational materials prepared for Back to School Night.
- ❑ Develop a list of community resources that may be helpful to parents in the event of an emergency. Publish links to the resources on the school website. Publicize the hotline number for recorded emergency information.
- ❑ Identify parents who are willing to volunteer in case of an emergency, include them in preparation efforts, and include them in training.
- ❑ Be prepared with translation services for non-English speaking families and students with English as a Second Language.

In the event of an emergency, parents' first reactions are likely to involve *fear* or *anxiety*. They will want to know: a) their children are safe; b) how the emergency is being handled; and c) assurance that the children will be safe in the future.

Establishing a system for responding quickly to parent needs for information is an important part of pre-planning. In the event of an emergency or disaster, develop materials to inform parents exactly what is known to have happened.

- ❑ Do not embellish or speculate. Explain what happened; focus on facts.
 - ❑ Describe how the school and school district are handling the situation.
 - ❑ Provide information regarding possible reactions of their child and ways to talk with them.
 - ❑ Provide a phone number, website address or recorded hotline where parents may receive updated information about the emergency.
 - ❑ Inform parents and students when and where school will resume.
 - ❑ Schedule and attend an open question-and-answer meeting for parents as soon after the incident as possible. The meeting will provide an opportunity for school officials to listen and respond to parent concerns (which is helpful in combating rumors and other misinformation) and to work on restoring parental trust in the school.
-

HANDLING RUMORS

People are going to talk about an emergency and without facts, people speculate. Rumors create a negative perception of the school's ability to manage an emergency. The most effective strategy for combating rumors is to provide facts as soon as possible:

- Identify and notify internal groups including administrators, teachers, students, custodians, secretaries, teaching assistants, cafeteria workers, bus drivers, etc. These are primary sources of information who are likely to be contacted in their neighborhoods, at grocery stores, etc. It is critical that they have accurate information because what they know will be passed on. A faculty/staff meeting should be held before staff members go home so that information about the scope, cause of and response to the emergency can be clearly communicated.
- Clerical staff who answer the telephone at the school and at the District Office must know what information can be shared and what information is considered confidential. They must also be kept informed about inaccurate information that is circulating so they can help correct misinformation. Designating staff to answer calls helps control the circulation of misinformation.
- Use of key communicators in the community will also combat rumors. A telephone tree, news release or a briefing held especially for identified community representatives directly associated with the school will help convey accurate information.
- The media can also help control rumors; ask reporters to provide frequent updates to the public, particularly providing accurate information where rumors need to be dispelled.
- After an immediate emergency has passed, a public meeting may be helpful. It provides an opportunity for people to ask questions and to receive accurate information. A follow-up public meeting may help restoring the community's confidence in the school's ability to manage emergencies and to provide a safe environment.
- If the incident involved damage or destruction, schedule an open house for parents and other community members to see the school restored. This will help everyone put the emergency behind them.

COMMUNICATING WITH THE MEDIA

Most news people are sensitive when reporting emergencies that occur in school settings and are interested in doing a reputable job. The following suggestions will promote clear communications with the media:

- ❑ Identify a Public Information Officer or single information source.
 - ❑ Direct media representatives to one area (on or off campus) where briefings can take place.
-

- ❑ Instruct all staff to refer all information and questions to the Public Information Official or Media Liaison or District Office. Remind staff that only designated spokespeople are authorized to talk with news media.
- ❑ Insist that reporters respect the privacy rights of students and staff. Answer questions within the limits of confidentiality.
- ❑ Advise students of the school's student media policy.
- ❑ Take initiative with news media and let them know what is or is not known about the situation.
- ❑ Emphasize school's/district's good record.
- ❑ Speak to reporters in plain English - not in "educationese."
- ❑ If the emergency is a death, Principal should consult with the deceased student/staff member's family before making a statement about the victim.
- ❑ If there is involvement with a criminal case, work in conjunction with law enforcement spokesperson.
- ❑ When communicating, maintain a unified position and message; keep messages concise, clear, and consistent.
- ❑ Don't try to "kill" a story; don't say "no comment;" don't speculate; don't pass blame.
- ❑ Contact District Support Team to regularly update.
- ❑ Delay releasing information until facts are verified and the school's position is clear.
- ❑ Assign sufficient staff to handle phones and keep a log of calls and personal contacts.
- ❑ Express appreciation to all persons who helped handle the emergency.

Prepare statements about the situation to avoid ad-libbing. Important points to make are: preparedness of the school; coordination of efforts with community agencies, access to information for parents; responsible immediate action taken by school representatives (including those in positions of authority); and support provided for students at the school. Always provide a phone number to call for additional or updated information.

D. ACCOMMODATIONS FOR SPECIAL NEEDS POPULATIONS

The cumulative effects of trauma and other environmental stimuli have compelled school administrators to identify and implement methods for assisting students who are unable to function and learn in traditional ways and/or settings. The Americans with Disabilities Act (ADA) mandates that no one be discriminated against in any procedures or programs, including emergency evacuations. The key for compliance is the creation of an Evacuation Plan for those who require extreme special handling. It should cover the evacuation and transport of students with

- blindness or visual impairments;
 - cognitive or emotional impairments;
 - deafness or hearing impairments;
 - mobility impairments (permanent and temporary);
 - medically fragile health (asthma, severe allergies).
-

It is critical to make appropriate accommodations to ensure the safety of these special populations of students. In most cases, additional safeguards need to be established regarding roles, responsibilities and procedures for students with physical, sensory, emotional and health disabilities.

DEVELOPING A SPECIAL NEEDS EVACUATION PLAN

- ❑ Review all paths of travel and potential obstacles.

Determine the primary and secondary paths of exit to be used during emergencies. Individuals with mobility impairments will need an exit that avoids barriers such as stairs, narrow doors and elevators. Identify areas of rescue where students with special needs can wait for assistance. Post a sign with the name and location so that the students will know exactly where they are.

- ❑ Identify the staff and students with special needs and the type of assistance they will require in an emergency.

Use the forms in **APPENDIX E** to collect information about the staff and students with special needs in the building. Allow visitors to self-identify on a sign-in log if they have special evacuation. Discuss evacuation issues with the staff members and any caretakers of students with special needs. Include individuals who may be temporarily disabled, e.g., a student with a broken leg.

- ❑ Install appropriate signage and visual alarms.

Place evacuation information indicating primary and secondary exits in all offices, classrooms, multipurpose rooms, lunchrooms, hallways/corridors, lobbies, bathrooms and cafeterias. In order to comply with ADA Accessibility Guidelines for Buildings and Facilities requirements, the signage should be:

- approximately 60 inches above the floor
- in a location that is not obscured in normal operation such as the swing of a door
- in all primary function areas.

- ❑ Train staff in general evacuation procedures.

Review the areas of rescue, primary exits, evacuation techniques, and the location and operation of emergency equipment.

- ❑ Provide in-depth training to those designated to evacuate students with special needs.

The ADA allows medical information to be given to people responsible for assisting in evacuating disabled individuals. Develop a policy and consent form with legal counsel for sharing this information. Anyone can assist a student with a visual impairment.

- ❑ Review the plan with emergency response personnel, including local police, fire and emergency medical technicians.

Walk around the school building so that first responders are familiar with primary exits and all areas of rescue.

- ❑ Consider classroom location in placement of students with disabilities

Evaluate the handicap accessibility of nearby exits or proximity to the school nurse.

- ❑ Include individuals with special needs when conducting evacuation drills.

Provide training that focuses on the unique preparedness needs of the target audience. Make sure students with disabilities understand and can carry out actions required in an emergency. Stress self-help responsibilities and capabilities as well as the importance of self-assessment of emergency needs.

IMPLEMENTING A SPECIAL NEEDS EVACUATION PLAN

Blind or Visually Impaired – In most cases, someone who is blind or visually impaired will be able to evacuate the same route as sighted students, but may need some assistance.

- Touch the person on the elbow gently.
- Identify yourself and quickly explain the situation
- Ask if the individual has any preferences regarding how to be guided.
- Lightly nudge the person with your elbow so that he or she can grasp it. Move forward quickly.
- Clearly describe where you are going and any approaching obstacles or protruding objects which will require a change in your walking path or pattern.
- Be protective of your space as there may be many people using the same route to evacuate.

Cognitively or Emotionally Impaired – It is likely that students with cognitive or emotional impairments will be able to use the same evacuation routes as the other students. The challenge is to keep them calm as you exit.

- If there is a companion assistant, quickly describe the situation and how to involve him or her in the evacuation.
- Let the student know what is happening.
- Keep him/her reassured.
- Remain with the student until directed otherwise by the school administrator or emergency response personnel.

Deaf and Hearing Impaired – The primary goal is to effectively communicate the nature of the situation and direct them to the appropriate route of evacuation. Students with hearing impairments will most likely be able to follow the same exit route as those who can hear. Communicate with a notepad and pen, with simple, concise speech or with sign language. Regardless of the method of communication used, convey two key messages:

- 1) There is an emergency.
- 2) How to exit.

Evacuation assistants should practice some basic American Sign Language for emergency communication such as:

- important, keep calm
 - must leave now
 - elevator closed
 - fire exit
 - emergency
 - fire
 - stairs there
 - okay
-

Mobility Impaired – These are students who require crutches, walkers, canes or wheelchairs. Evacuating them requires helping exit a building without encountering barriers such as stairs.

- For ramps, to avoid picking up too much speed, assist by grabbing the footrests or frame.
- To assist a student going downstairs in a wheelchair, tilt the chair backwards to prevent him/her from sliding out. Lower the student, maintaining the backward tilt of the chair.
- To assist a student going upstairs, roll the wheelchair back against the bottom step. Pull the chair up one step at a time while maintaining the backward tilt.
- During an earthquake, those in wheelchairs should get under a doorway, lock their wheels and cover their heads.

Other considerations for Special Needs Populations

- Carry medical information in wallets and purses.
- Store extra batteries for electric wheelchairs and hearing aids

E. DRILLS AND TABLETOP EXERCISES

CONDUCTING DRILLS

The purpose of any drill or exercise is to reveal planning weaknesses; uncover resource needs and shortfalls; improve coordination within the district and community; clarify roles and responsibilities; and improve overall performance of all staff and students. It is essential to practice the Plan periodically to make sure that it works, and that all personnel understand their roles. Exercises with key school personnel, back-ups, and local emergency responders should occur on a regular basis. FEMA suggests four ways to accomplish this goal:

1. **Drills** simulate an emergency in a limited scope, typically involving one supporting agency.
 - An informal discussion of simulated emergencies
 - May test a single component or function of the Emergency Management Plan (for example, a “Lock-Down” drill)
 2. **Tabletop exercises** simulate an emergency situation in an informal, stress-free environment designed to elicit discussion to resolve coordination and responsibility issues based on existing Emergency Management Plans.
 - An informal discussion of simulated emergencies
 - No time pressures
 - Low stress
 - Useful for evaluating plans and procedures
 - Helpful to resolve questions of coordination and responsibility
 3. **Functional Exercises** simulate a real emergency under time-sensitive conditions by testing coordination among various functions and outside response agencies.
 - Focuses on policies, procedures, roles and responsibilities
 - More stressful and realistic simulation of real life situations
 - Usually takes place in “real time”
 - Emphasizes the emergency functions of the Emergency Management Plan. Examples might include perimeter security (securing all doors of the
-

school), utility shut-downs, and accounting for all the people who should be in the school at the time (to include students and staff).

- School's Emergency Management Team is activated.

4. **Full Scale Exercises** test an entire community's response capability. This involves using real equipment.

- Takes place in "real time" and tests total response capability as close to a real emergency as possible.
- Includes mobilization of emergency personnel and community resources required to demonstrate coordination and response capability that would be anticipated to support the school in crisis.
- Coordinates many agencies and functions, both internal and external to the district
- Intended to test several emergency functions, either concurrently or in sequence
- Could involve activating an Emergency Operations Center (EOC)

REASONS TO CONDUCT DIFFERENT TYPES OF EXERCISES

Orientation Seminar	Drill	Tabletop Exercise	Functional Exercise	Full-Scale Exercise
No prior exercises No recent crises New plan New procedure New staff leadership New facility Newly Identified threat New assisting local agency	Establish equipment capabilities Determine response times Personnel training Interagency cooperation Determine resource and manpower capabilities	Practice group problem solving Executive familiarity Specific case study Specific threat area Examine manpower contingencies Test group responsibility interpretation Observe information sharing Assess interagency coordination Train personnel in negotiation/interaction	Evaluate any function Observe physical facilities use Reinforce established policies and procedures School accreditation Test seldom used resources 'Measure resource adequacy Confirm interagency relationships	Information analysis Interagency cooperation Policy confirmation Negotiation Resource and manpower allocation Media attention Equipment capabilities Interagency operations and relations

MANDATED DRILLS

In accordance with state law:

- Fire drills will be conducted on a monthly basis.
- An earthquake "Drop, Cover and Hold" drill will be held each quarter for elementary schools and once each semester for secondary schools. (EC 35297)
- Test earthquake plan, or portions thereof, on a rotating basis, at least two times during the school year. (Section 560, Title V, California Administrative Code)
- All students and staff will participate in these mandated drills.
- A district-wide drill/simulation is recommended yearly.

F. STAFF PERSONAL PREPAREDNESS

When a major emergency occurs, every school and district employee should be prepared and committed to serving their students. Per California Government Code Section 3100, during a disaster, public employees become “Disaster Service Workers”. As Disaster Service Workers, school staff and teachers will be called upon to serve at their school sites, unless otherwise directed by authorities. To do this effectively, each employee must:

- ❑ have the confidence that they have prepared their families to deal with emergencies in their absence
- ❑ know how to complete those tasks for which they are assigned

The time and energy a staff member commits to being prepared at home will provide the best assurance that they are capable of dealing with crisis situations at the school site.

STAFF RELEASE PLAN

Administrators will take into consideration the family needs of employees and release staff accordingly. Schools should work with staff prior to an emergency to develop criteria agreed upon for release of staff. Such criteria might include (presented without respect to priority):

- Single parents with pre-school children
- Single parents with children in primary grades
- Single parents with children in elementary schools
- Staff member with housebound dependents
- Persons with health problems or disabilities
- Persons living in areas of major damage
- Married parents with pre-school children
- Married parents with children in primary grades
- Married parents with children in elementary schools

G. EMERGENCY SUPPLIES AND EQUIPMENT

APPENDIX G contains lists of basic emergency supplies, separated into the following functions as part of an emergency plan.

- Classroom Backpack
 - Classroom Lockdown Kit
 - Student Release File Box
 - Incident Command Center Box
 - Medical Supplies
 - Light Search and Rescue Supplies
 - Building Safety/Damage Assessment Supplies
 - Traffic/Crowd Control
 - School Bus/Auto Emergency Supplies
 - School Shelter Supplies (Food/Water, etc.)
-

There is no definitive supplies list. Information provided is the recommended minimum type and quantities. Schools should review the lists and adjust them for individual campus needs.

STORAGE CONTAINER

Purpose. The objective of a storage container is to have available a cache of supplies to sustain the school community in the aftermath of a disaster if the area is cut off from outside help for up to 72 hours. An earthquake or fire may render school buildings unusable, making outdoor storage a prudent choice.

Site Selection. The location of the storage container should be carefully selected to provide stable, safe and easy access in proximity to the emergency evacuation area. Install the storage trailer on a level surface atop stable soil and stable concrete footings reinforced with short piers at the corners. Rigidity of the flooring is critical since even slight settling may cause the heavy doors to rack and bind, making them difficult if not impossible to open. Avoid placement of the container in gullies that may flood during a storm. Avoid placement below over-hanging wires, beneath large tree branches or upon soft, shifting soil.

Storage Structure. A cargo container provides adequate room, strength, weather resistance and portability for storing school site emergency supplies. Size and quality vary, and the container should be inspected for damage, deterioration, water-tightness and a well-functioning door prior to acquisition. Many schools prefer containers that are 8' x 20', which allows for adequate headroom. Good ventilation is essential to maintain climate control, with intake vents on the sides and an exhaust (turbine) vent on the roof. Install sturdy metal and plywood shelving against one or both walls, and secure the shelving to the side of the container. A 1"x1" removable wooden bar placed at the front edge will prevent boxes and supplies from sliding off the shelves in the event of an earthquake. A supplementary roof will provide insurance against rain leaks, and a gabled overhang may soften the appearance of the structure and provide coverage from rain at the doors where supply distribution occurs. A student mural painted on the most visible sides of the structure may help incorporate it into the campus infrastructure and make it seem less threatening. The walls of the storage container should not be used for handball or basketball.

Security. The storage facility makes an attractive target for theft or vandalism. Do not leave it unlocked or unattended. Brass, all-weather lock boxes are best suited for the security of the container. It is preferable to limit access to a few designated individuals who have carefully reviewed the procedures and been given a walk-through orientation of the storage container. Include access by program managers for after-school activities and events.

Maintenance. Develop procedures to keep the structure and contents functional, clean, dry, up-to-date and in sound condition. Post the procedures on or near the door. Inspections should be made annually. Structural maintenance may involve resealing of exterior seams, repainting of exterior walls, lubricating the door mechanism and resurfacing the roofing. Vents must remain unobstructed. Dampness may cause mildew and rust the stored equipment.

Supplies Inventory. Attach a laminated interior diagram of the supply container near the inside entrance. Store equipment in order of use, e.g., Search and Rescue supplies near the front door for immediate access. Maintain a dated inventory

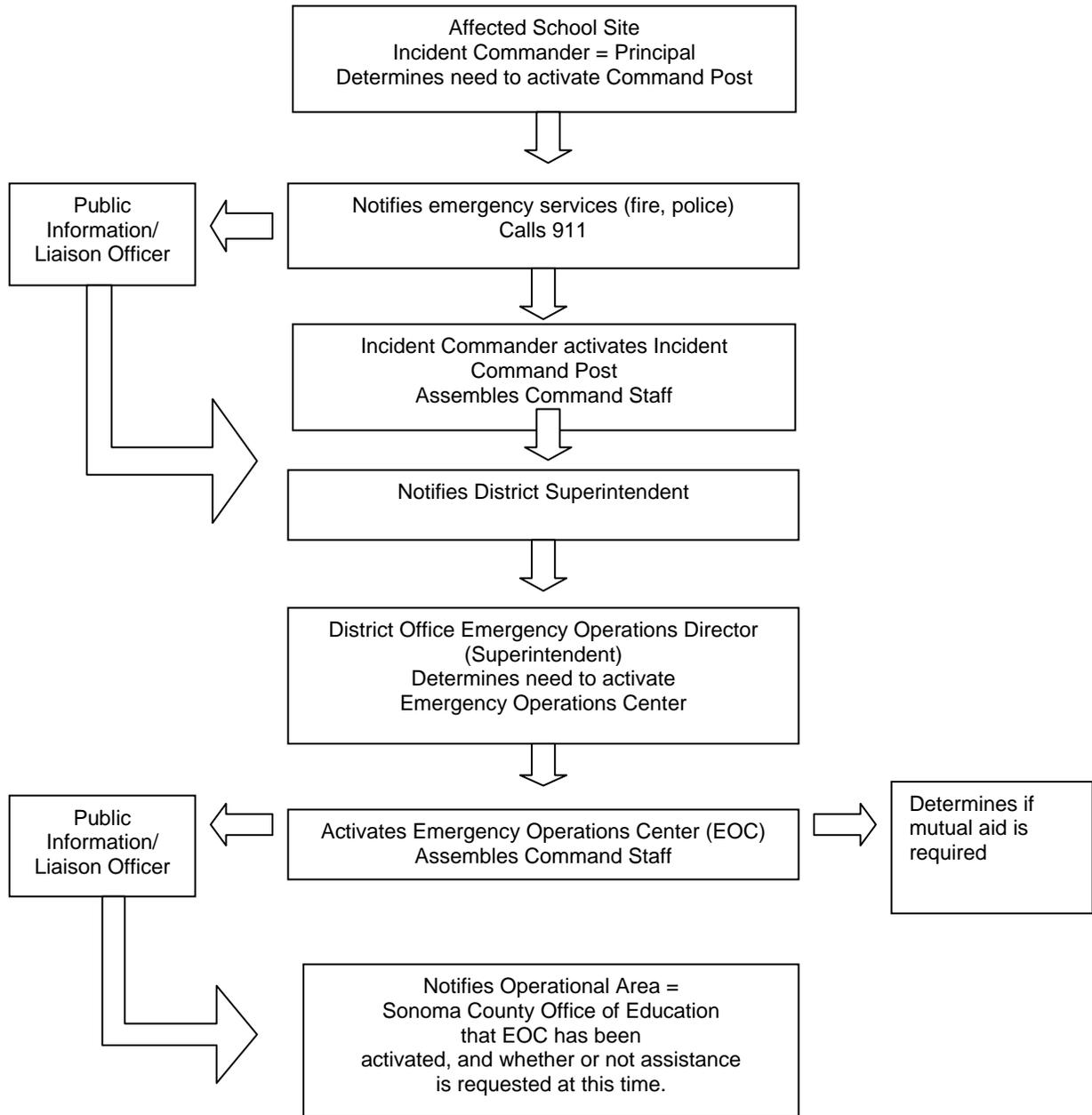
of the stored supplies, shelf-life replacement schedule, and vendor contact information. Attach a clipboard to maintain a wish list and missing, needed or replacement supplies. **APPENDIX G** includes a form to record this information. Space and budgetary limitations and the need for strict organization require that particular care be given in the purchase and placement of new and returned items in the container.

H. SAMPLE SCHOOL EMERGENCY PLANNING CALENDAR

Effective emergency preparedness involves engaging in certain activities year after year, such as assessing site hazards, scheduling drills, arranging for staff training and updating emergency supplies. The development of an annual Emergency Planning Calendar assures that all the routine tasks are not overlooked. The following page shows a sample School Emergency Planning Calendar that may serve as the basis for individual site needs.

PERSON RESPONSIBLE	ACTIVITY	MONTH
PRINCIPAL or DESIGNEE	<ul style="list-style-type: none"> ○ School Facilities Hazard Assessment Walk-through (Buildings, Grounds, Evacuation Routes, Shut-Offs) ○ Review School Emergency Management Plan ○ Update School Emergency Team Assignments ○ Staff Skills Survey for new teachers ○ New assignments as needed ○ Staff Orientation of School Emergency Management Plan ○ Plan annual training schedule ○ Update resource agreements and contacts ○ Parent Back to School Assembly ○ <i>Fire Drill</i> ○ Staff meeting: Review Winter Storm/Flooding Preparedness ○ <i>Earthquake Drill</i> ○ CPR/ First Aid training w/ Fire Department ○ <i>Fire Drill</i> ○ Staff development emergency training ○ <i>Shelter-in-Place Drill</i> ○ <i>Earthquake Drill</i> ○ Earthquake Drill planning with Fire Dept/Public Safety ○ Earthquake Drill planning w/ Staff ○ <i>Fire Drill</i>, Tabletop exercise ○ <i>Countywide/District Drill</i> ○ Review Drill Assessment 	August August August August August September September September October October November November January January February March March March April
SECRETARY	<ul style="list-style-type: none"> ○ Update classroom backpacks (rosters, etc.) ○ Distribute Emergency Cards/ Student Release Procedures to families 	September September
MAINTENANCE DIRECTOR	<ul style="list-style-type: none"> ○ Conduct facility hazard assessment ○ Check fire extinguishers, batteries ○ Review equipment needs ○ Update school maps and site plans 	August August September September
TEACHERS	<ul style="list-style-type: none"> ○ Staff Orientation of School Emergency Management Plan ○ CPR/ First Aid training w/ Fire Department ○ Staff development emergency training 	August November January
PTA DISASTER COORDINATOR	<ul style="list-style-type: none"> ○ Recruit Parent Disaster Committee ○ Replenish Emergency Supply Cache ○ Family preparedness materials to parents ○ Preparedness tips in PTA Newsletter ○ Recruit Parent Disaster Committee 	September Sept - Oct October Monthly April

I. SCHOOL EMERGENCY RESPONSE FLOW CHART



J. SCHOOLS AS SHELTERS

SHORT-TERM SHELTER. A disaster may occur at any time of the school day and in any type of weather. Students and staff will need to be provided shelter while awaiting reunion with their families. Short-term care is considered any time up to three hours past dismissal. Long-term care may last up to 72 hours or more.

Shelter considerations:

- ❑ Determine need for shelter. Bring students indoors into a safe building, if at all possible.
- ❑ Maintain a list of all persons, including staff, in the shelter.
- ❑ Place nametags on all students.
- ❑ Report problems and any special needs, especially medical needs, to the Shelter Manager.
- ❑ Store laundered clothing in limited quantities for shelter use.
 - Children wearing bloodied clothing should be changed immediately.
 - Stress may lead to soiled undergarments, which the child may be too embarrassed to admit. Watch for tell-tale signs, especially among the younger children.
 - If it is raining, distribute plastic bags to use for protection.
- ❑ Recruit volunteers to assist with storytelling, entertainment and recreation.
- ❑ As students are released to parents or authorized individuals, record on the occupancy log when released, to whom and destination.
- ❑ As shelter population decreases, consider consolidating students remaining with those at another school site. Release teachers and staff in order of priority dismissal list. Determine which staff will remain until all students have been released.
- ❑ Implement a pre-arranged procedure to deal with community members who arrive at the shelter to offer assistance, to seek shelter if their homes are damaged, to seek emergency medical attention for themselves, or simply to find solace with others who have all experienced a frightening disaster.

COMMUNITY SHELTER. Schools are required by both federal statute and state regulation to be available for community shelters following a disaster. The American Red Cross has access to schools in damaged areas through mutual Statements of Understanding to set up their mass care facilities. Schools with cooking and shower facilities are preferred. Local governments have a right to use schools for the same purposes. This requires close cooperation between school officials and American Red Cross or local government representatives, and should be planned and arranged for in advance. A Sample Shelter Agreement with the American Red Cross is included in **APPENDIX B.**

In order to minimize confusion, prevent unauthorized use of shelter resources and facilitate the process of reunifying children with parents or guardians, community members seeking shelter should not be sheltered with remaining students and school staff. Emergency supplies stored by the school are for the sole use of the students and school staff. When children and staff have left the school, the principal may decide whether the unused shelter supplies will be offered to the community shelter occupants.

K. WEBSITES FOR MORE INFORMATION

Marin County Office of Education Emergency Services

<http://mcoeweb.marin.k12.ca.us/EmerPrep>

This web site provides access to information on disaster preparedness, response, recovery and mitigation for the County of Marin. It includes weather and road conditions, agencies, and steps to organize your neighborhood.

Marin County School/Law Enforcement Partnership

<http://mcoeweb.marin.k12.ca.us/SchoolLawB2/frontpage2.htm>

The Marin County School/Law Enforcement Partnership is a committee representing education, law enforcement, probation, Health and Human Services, community-based agencies, the District Attorney's Office, the Public Defender's Office and the PTA. Protocols are posted for bomb threats, guns fired or intruder on campus, police interviewing on campus, combating hate crimes, and threat assessment.

Marin InterAgency Disaster Coalition

<http://www.co.marin.ca.us/disaster/AgencyLinks/midc.cfm>

Private and public organizations of the Marin InterAgency Disaster use their cooperative efforts to identify and improve preparedness planning. They are the primary clearinghouses for a variety of emergency resources and services, including pet care, food and clothing, emotional and spiritual support, financial assistance and volunteers.

Marin County Health and Human Services - Emergency Medical Services

<http://www.co.marin.ca.us/ems/>

The Emergency Medical Services (EMS) program is responsible for the planning, implementation and evaluation of the EMS system established to provide pre-hospital services. Five fire service based providers, three private companies, and three hospitals provide basic emergency medical services and on-line paramedic consultation as needed.

California Office of Emergency Services

<http://www.oes.ca.gov>

The OES website links to laws, regulations, response information management systems and other information regarding California emergency services.

California Department of Transportation (CalTrans)

<http://www.dot.ca.gov/hq/roadinfo/>

CalTrans updates current highway information throughout the state 24 hours a day.

Federal Emergency Management Agency (FEMA)

<http://www.fema.gov/>

FEMA is an independent federal agency that works in partnership with state and local emergency management agencies, 27 federal agencies and the American Red Cross. FEMA's web site provides updates on disasters, risk reduction advice, and assistance programs after a disaster.

American Red Cross

<http://www.redcross.org/services/disaster/> AND <http://www.prepare.org>

The American Red Cross provides extensive information on disaster management and including individual and community disaster preparedness and recovery. American Red Cross - Bay Area Chapter

National Weather Service

<http://www.nws.noaa.gov/om/severeweather/index.shtml>

The Earthquake Hazards Program of the U.S. Geological Survey posts links to earthquake safety and preparedness resources, frequently asked questions, publications and fact sheets. The USGS is a bureau of the U.S. Department of the Interior.

Centers for Disease Control and Prevention

<http://www.cdc.gov/>

The Centers for Disease Control and Prevention (CDC), located in Atlanta, is the lead federal agency for preventing and controlling disease, injury, and disability, and protecting the health and safety of people at home and abroad.

#

III – RESPONSE

One of the true tests of leadership is the ability to recognize a problem before it becomes an emergency.

-- Arnold H. Glasow

Response is the process of implementing appropriate actions while an emergency situation is unfolding. In this phase, schools mobilize resources needed to address the emergency at hand. In any emergency situation, get help right away. Alert someone immediately—a school administrator, school nurse, the 911 Dispatcher, local fire department or police department, as appropriate.

A. CALLING 911

911 is a telephone number dedicated to calls for emergency assistance, such as a traffic accident, fires, paramedic service, crime in progress, bodily injury, imminent threat to life, or major property damage or loss.

The 911 Dispatcher is a trained dispatcher who will prompt what additional information is needed, based on the type of emergency (e.g., what the scene looks like, number of injuries or deaths). In order to complete an assessment on the telephone, the 911 Dispatcher may have many questions to ask depending upon the nature of the problem. It is very important for the dispatcher to obtain as much information as possible, in the interests of responder safety and to dispatch the correct level of medical response.

The 911 Dispatcher may ask you to stay on the line until responders arrive. This will assist the dispatcher in keeping the fire, police or rescue squad updated as the situation being reported unfolds.

WHEN REPORTING AN EMERGENCY

- Remain calm and speak slowly and clearly while explaining the type of emergency you are reporting.
- Provide your name, location of the incident and your location, if different from the scene of the emergency.

Though the technology exists which presents address and phone number data immediately to the 911 Dispatcher it is not available in all locations. The 911 Operator is trained to confirm and verify the phone number and address for EVERY call received. The dispatcher will ask questions concerning the type of emergency being reported. The answers you provide will be relayed to the responding emergency personnel.

- Answer all questions asked by the 911 Dispatcher, even those that seem repetitious.
-

- Stay on the line while the 911 Dispatcher processes the call. You may need to provide additional information or to receive instructions from the 911 Dispatcher. Do not hang up until the Dispatcher says to do so.
- No matter what the situation, try to remain calm. Be sure to speak slowly and clearly.

CALLING 911 FROM A CELL PHONE

911 calls from cellular phones are answered by California Highway Patrol (CHP) personnel and routed to the proper agency. 911 personnel do not know the location from where you are calling. It is important to know your cell phone number, and be aware of your surroundings so you can tell the dispatcher where you are. Ideally, street names and addresses should be provided. Since many cell phone calls are made from moving vehicles, callers should inform the dispatcher when they change locations.

Time is of the essence. Every 911 Operator knows that. It hampers response when a 911 operator has to ask the caller for information several times over because he/she couldn't comprehend what was being said. Try to be as calm as possible and speak slowly and clearly. This ensures the 911 operator has the correct information the first time he/she asks for it.

B. ACTIVATING THE EMERGENCY OPERATIONS CENTER

The decision to activate the Emergency Operations Center or Incident Command Post rests with the Incident Commander (school site) / EOC Director (District Office). The decision should be based on whether or not there is a need to coordinate a response to an emergency situation.

If there are few or no decisions to make, there may be no need to activate the Emergency Operations Center (EOC). However, consider activating the Incident Command structure whenever assistance making decisions or carrying out actions to respond to a crisis or emergency would be helpful. This is not limited to physical disasters. Situations involving a heightened emotional state of students or staff may benefit from the use of the Incident Command System (ICS) to manage the crisis. The ICS can also be used as a management tool to handle planning of unusual or large events.

Examples of situations that could benefit from activation of the ICS include:

- Fire
- Explosion
- Earthquake
- Flood
- Death of a student or staff member (especially suicide, and especially if on-campus)
- Violence or threat of violence
- Bus accident involving student injuries
- Large event hosted on campus (graduation, large concert, large sporting event, etc.)

The ICS is flexible in scope and size. The Incident Commander may want to activate only portions of the team from the outset, and expand or contract it as the event progresses.

C. SCHOOL PERSONNEL EMERGENCY CHECKLISTS

In addition to the Emergency Team assignments, every staff member has general responsibilities during an emergency.

PRINCIPAL/SITE ADMINISTRATOR

- Assume overall direction of all emergency responses based on actions outlined in this Plan. Good judgment, based upon the facts available, is of paramount importance.
- Identify the type of crisis. Obtain as much information about it as possible, and determine the appropriate response.
- Identify key staff who should be involved in planning the response.
- Activate the Incident Command System and, if appropriate, the Incident Command Post.
- Establish contact with the district Emergency Operations Center (EOC).
- Ascertain what action needs to be implemented. Secure the school building, if necessary.
- Maintain communication among all relevant staff at officially designated locations.
- Establish what information needs to be communicated to staff, students, families, and the community. How will they be informed? Who will do what?
- Ascertain medical needs. Monitor how emergency first aid is being administered to the injured.
- Decide if more equipment and supplies are needed.
- Identify what community resources need to be involved. Who needs to be contacted for additional assistance/support?
- Identify provisions required for special needs population.
- Determine whether special transportation arrangements are needed.
- Prepare informational letter for parents/guardians to squelch rumors.
- Arrange for post-disaster trauma counseling for students and staff.
- Identify follow-up activities that will be used to evaluate response.

OFFICE STAFF

- Provide assistance to principal, as needed.
 - Handle telephones.
 - Monitor radio emergency broadcasts and communications.
 - Assist with health emergencies, as needed.
 - Set up Student Release tables, if needed.
 - Serve as messengers.
-

TEACHERS

- Supervise students in their charge.
- Direct evacuation of students to inside or outside assembly areas, in accordance with signals, warning, written notification or PA orders.
- Take attendance when class relocates to another assembly area.
- Report missing students to principal.
- Send students in need of first aid to school nurse or person trained in first aid. Acquire assistance for those who are injured and need to be moved.

INSTRUCTIONAL ASSISTANTS/AIDES

- Assist teacher, as needed.
- Maintain order in classroom and during evacuation.

CUSTODIANS/MAINTENANCE PERSONNEL

- Shut off gas and/or water if required by the emergency.
- Seal off doors, shut down HVAC system if required by the emergency.
- Examine buildings for damage; provide damage control.
- Keep principal/site administrator informed of condition of school.
- Assist as directed by the principal.

BUS DRIVERS

- ... Supervise the care of children if disaster occurs while they are in bus.
- ... Transfer students to a new location when directed.
- ... Transport individuals in need of medical attention.

NURSES/HEALTH ASSISTANTS

- ... Administer First Aid.
- ... Supervise administration of First Aid by those trained in it.
- ... Organize First Aid and medical supplies.
- ... Set up First Aid station, if needed.

OTHER SCHOOL EMPLOYEES

- ... Report to principal/site administrator for directions.
-

D. EMERGENCY ACTIONS = ALERT LEVEL PROCEDURES

Emergency Actions are a set of simple directives and alert level procedures that may be implemented across a number of emergency situations. When an emergency occurs, it is critical that staff members take immediate steps to protect themselves and others. With Emergency Actions in place, staff can follow specific directions without having to learn extensive protocols for each of several dozen different emergency situations. The Incident Commander will decide which Emergency Actions to implement, based on the situation.

The most common immediate emergency actions below are listed below, followed by specialized emergency actions. Specific steps to take for each of these are detailed in the following pages. Staff members must become familiar with each emergency action and be prepared to perform assigned responsibilities. All students must be taught what to do when any of the common emergency actions are implemented.

COMMON EMERGENCY ACTIONS	
<p>ALL CLEAR</p> <p>Used to conclude other immediate emergency actions and to notify staff and students that normal school operations can resume.</p>	<p>DROP/DUCK/COVER AND HOLD ON</p> <p>The action taken during an earthquake to protect students and staff from flying and falling debris.</p>
<p>EVACUATION</p> <p>The orderly movement of students and staff from school buildings to another area when conditions outside are safer than inside.</p>	<p>LOCKDOWN</p> <p>Initiated when there is an immediate or imminent threat to occupants of a school building and movement within will put students and staff in jeopardy. Lockdown involves a “no one in, no one out” scenario.</p>
<p>SHELTER IN PLACE</p> <p>Implemented to isolate students and staff from the outdoor environment and provide greater protection from external airborne contaminants.</p>	<p>STAND BY</p> <p>Notifies students and staff that further instructions will follow shortly.</p>
SPECIALIZED EMERGENCY ACTIONS	
<p>CONVERT SCHOOL</p> <p>Initiated when a requirement exists during a disaster for community medical facilities or community shelters (run by the Marin County Department of Health and Human Services or American Red Cross)</p>	<p>DIRECTED TRANSPORTATION</p> <p>Implemented when students and staff are loaded into school buses, cars and any other available means of transportation and moved from an area of danger to an area of lesser danger.</p>
<p>OFF-SITE EVACUATION</p> <p>Implemented when it is unsafe to remain on the campus, and evacuation to an off-site assembly area is required.</p>	<p>REVERSE EVACUATION</p> <p>Initiated if an incident occurs while students are outside and conditions are safer inside the building.</p>
<p>STUDENT RELEASE</p> <p>Instructs staff to prepare for releasing students from school during the academic day.</p>	<p>TAKE COVER</p> <p>Instructs staff and students to move to and take refuge in the best-shielded areas within the school buildings.</p>

EMERGENCY ACTION

ALL CLEAR

ALL CLEAR is used to conclude other immediate actions taken upon an emergency to notify staff and students that normal school operations can resume. **ALL CLEAR** signifies that the emergency is over. This is the final ACTION used to conclude the following actions:

- **DUCK, COVER and HOLD ON**
- **EVACUATION and REVERSE EVACUATION**
- **LOCKDOWN**
- **SHELTER IN PLACE**
- **STANDBY**
- **TAKE COVER**

ANNOUNCEMENT:

1. Make the following announcement in person directly or over the public address system:

Example: “**Your attention please.** (Pause) **ALL CLEAR.** (Pause) **ALL CLEAR.** (Pause) **ALL CLEAR.** (Pause) **ALL CLEAR.** (Pause). **It is now OK to resume normal school activities. Thank you all for your cooperation.**”

2. Use messengers with oral or written word as an alternate means of staff notification.
3. Use Parent Telephone Notification System, if appropriate.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- ❑ Determine that the emergency is over and it is safe to resume classes. It may be necessary to talk to first responders to make this determination.
- ❑ Make the **ALL CLEAR** announcement.
- ❑ Send home with students for their parents/guardians a brief written description of the emergency, how it was handled and, if appropriate, what steps are being taken in its aftermath.

STAFF ACTIONS:

- ❑ As soon as the **ALL CLEAR** announcement has been made, return to the classroom or to desks and chairs, unlock doors and windows, and immediately begin discussions and activities in classrooms to assist students in addressing fear, anxiety and other concerns.
 - ❑ Use Parent Telephone Alert System, if appropriate.
-

EMERGENCY ACTION

DUCK, COVER AND HOLD ON

DUCK, COVER AND HOLD ON is the action taken during an earthquake to protect students and staff from flying and falling debris. It is appropriate action for:

- Earthquake
- Explosion

ANNOUNCEMENT:

The following announcement will be made over the public address system and by teachers in classrooms:

Example: **“Attention please. We are experiencing seismic activity. For your protection, follow DUCK, COVER AND HOLD ON procedures. Get under a table or desk, away from windows and anything that could fall and hurt you. Hold that position until the shaking stops or until you receive further instructions.”**

STAFF AND STUDENT ACTIONS:

Inside

- ❑ Arrange desks so that they do not face windows.
- ❑ Instruct students to move away from windows.
- ❑ Immediately drop to the floor under desks, chairs or tables. With back to windows, place head between knees, hold on to a table leg with one hand and cover the back of the neck with the other arm.
- ❑ Remain in place until shaking stops or for at least 20 seconds. When quake is over, leave building. Do not run. Avoid routes with architectural overhangs. Do not re-enter building until declared safe by competent authority.

Outside

- ❑ Instruct students to move away from buildings, trees, overhanging wires and **DUCK, COVER and HOLD ON.**
 - ❑ Upon the command **DUCK, COVER AND HOLD ON**, immediately move away from objects which might topple over, drop to the ground or get under a table close by, place head between knees, and cover back of neck with arms and hands.
 - ❑ Remain in place until shaking stops or for at least 20 seconds.
-

EMERGENCY ACTION

EVACUATION

EVACUATION is implemented when conditions make it unsafe to remain in the building. This ACTION provides for the orderly movement of students and staff along prescribed routes from inside school buildings to a designated outside area of safety. **EVACUATION** is considered appropriate for, but is not limited to, the following types of emergencies:

- Fire
- Bomb threat
- Chemical accident
- Explosion or threat of explosion
- Post earthquake

See next page for how to assist those with disabilities during an evacuation.

See also: **OFF-SITE EVACUATION**, which is implemented when it is not safe to remain on the school campus and **REVERSE EVACUATION**, when it is unsafe to remain outside.

ANNOUNCEMENT:

1. Fire alarm (bell or horn signal).
2. Provided time is available, make an announcement over the public address system:

<u>Example:</u>	"Attention please. We need to institute an EVACUATION of all buildings. Teachers are to take their students to their designated Assembly Area. Students please remain with your teacher."
-----------------	--

3. Implement Special Needs Evacuation Plan (see **Section II – Preparedness**).
4. Use messengers with oral or written word to deliver additional instructions to teachers in hold areas.

PRINCIPAL/SITE ADMINISTRATOR:

- ❑ The Assembly Area should be a safe location on the school campus away from the building and emergency response equipment that may arrive at the school. If unsafe for the current emergency, designate an alternate Assembly Area.
- ❑ When clearance to return to the buildings is determined or received from appropriate agencies, announce **ALL CLEAR** to return to classrooms and resume school activities.
- ❑ Send home with students for their parents/guardians a brief written description of the emergency, how it was handled and, if appropriate, what steps are being taken in its aftermath.

STAFF ACTIONS:

- ❑ Instruct students to leave the building in an orderly manner using the designated evacuation routes and reassemble in the assigned Assembly Area.
 - ❑ Take the emergency backpack and student roster when leaving the building and take attendance when the class is reassembled in a safe location. Report attendance to the Incident Commander/designee.
-

- ❑ Remain in the Assembly Area until further instructions are given.
- ❑ Wait for another ACTION or the **ALL CLEAR** instruction to return to school buildings and normal class routine.

HOW TO ASSIST THOSE WITH DISABILITIES DURING AN EVACUATION

The needs and preferences of non-ambulatory individuals will vary. Those at ground floor locations may be able to exit without help. Others may have minimal ability to move, and lifting may be dangerous. Some non-ambulatory people also have respiratory complications. Remove them from smoke and vapors immediately

To alert visually-impaired individuals

- ❑ Announce the type of emergency.
- ❑ Offer your arm for guidance.
- ❑ Tell person where you are going, obstacles you encounter.
- ❑ When you reach safety, ask if further help is needed.

To alert individuals with hearing limitations

- ❑ Turn lights on/off to gain person's attention -OR-
- ❑ Indicate directions with gestures -OR-
- ❑ Write a note with evacuation directions.

To evacuate individuals using crutches, canes or walkers

- ❑ Evacuate these individuals as injured persons.
- ❑ Assist and accompany to evacuation site, if possible -OR-
- ❑ Use a sturdy chair (or one with wheels) to move person -OR-
- ❑ Help carry individual to safety.

To evacuate individuals using wheelchairs

- ❑ Give priority assistance to wheelchair users with electrical respirators
 - ❑ Most wheelchairs are too heavy to take downstairs; consult with the person to determine the best carry options.
 - ❑ Reunite person with the wheelchair as soon as it is safe to do so.
-

EMERGENCY ACTION

LOCKDOWN

LOCKDOWN is initiated to isolate students and school staff from danger when there is a crisis inside the building and movement within the school might put students and staff in jeopardy. **LOCKDOWN** is used to prevent intruders from entering occupied areas of the building. The concept of **LOCKDOWN** is a “no one in, no one out” scenario. During **LOCKDOWN**, all exterior doors are locked, and students and staff are to remain in the classrooms or designated locations at all times. Teachers and other school staff are responsible for accounting for students and ensuring that no one leaves the safe area. **LOCKDOWN** is not normally preceded with any warning. This ACTION is considered appropriate for, but is not limited to, the following types of emergencies:

- Gunfire
- Rabid animal at large
- Extreme violence outside the classroom

LOCKDOWN differs from **SHELTER-IN-PLACE** because it does not involve shutting down the HVAC systems to provide protection from outside air and does not allow for the free movement of staff and students within the building.

ANNOUNCEMENT:

1. Make an announcement in person directly or over the public address system:

Example: **"Attention please. We have an emergency situation and need to implement LOCKDOWN procedures. Teachers are to lock classroom doors and keep all students inside the classroom until further notice. Do not open the door until notified by an administrator or law enforcement."**

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- ❑ Make the announcement. Instruct teachers and staff to immediately lock doors and remain in the classroom or secured area until further instructions are provided.
- ❑ Call 911. Provide location, status of campus, all available details of situation.
- ❑ When clearance is received from appropriate agencies, give the **ALL CLEAR** instruction to indicate that it is safe to unlock the doors and return to the normal class routine.
- ❑ Send home with students for their parents/guardians a brief written description of the emergency, how it was handled and, if appropriate, what steps are being taken in its aftermath.

STAFF ACTIONS:

- ❑ Immediately lock doors and instruct students to lay down on the floor.
 - ❑ Close any shades and/or blinds if it appears safe to do so.
 - ❑ Remain in the classroom or secured area until further instructions are provided by the principal or law enforcement.
-

EMERGENCY ACTION

SHELTER IN PLACE

SHELTER IN PLACE is a short-term measure implemented when there is a need to isolate students and staff from the outdoor environment to prevent exposure to airborne contaminants. The procedures include closing and sealing doors, windows and vents; shutting down the classroom/building heating, ventilation and air conditioning systems to prevent exposure to the outside air; and turning off pilot lights.

SHELTER IN PLACE allows for the free movement of staff and students within the building, although one should not leave the room until further instructions are received. Those in bungalows and buildings with exterior passageways must remain in the classroom while **SHELTER IN PLACE** is instituted. It is appropriate for, but not limited to, gas leaks, external chemical release, dirty bombs and hazardous material spills.

ANNOUNCEMENT:

1. Make an announcement in person directly or over the public address system:

Example: "Attention please. We have a hazard in the community and are instituting **SHELTER IN PLACE** procedures. Students and staff should remain inside with windows and doors securely closed and air conditioning units turned off. Those who are outside should immediately move to the protection of an inside room. Do not go outdoors until you receive further instructions."

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- ❑ Make an announcement on the public address system. Give clear instructions, remain calm and convey reassurance that the situation is under control.
- ❑ When clearance is received from appropriate agencies, give the **ALL CLEAR** instruction to indicate that the normal school routine can resume.
- ❑ Make arrangements for central HVAC shutdown, as necessary.

TEACHER and STAFF ACTIONS:

- ❑ Immediately clear students from the halls. Stay away from all doors and windows.
- ❑ Keep all students in the classroom until further instructions are received. Assist those needing special assistance.
- ❑ Secure individual classrooms: a) close and lock doors and windows; b) shut down the classroom HVAC system; c) turn off local fans in the area; d) seal gaps under doors and windows with wet towels or duct tape; e) seal vents with aluminum foil or plastic wrap; and f) turn off sources of ignition, such as pilot lights.
- ❑ Take attendance and call report in to school secretary. Wait for further instructions.

STUDENT ACTIONS:

- ❑ Proceed to the classroom, if it is safe to do so. If not, follow teacher or staff directions to nearby classrooms or other rooms (e.g., auditorium, library, cafeteria, multi-purpose room). If these are unsafe, follow instructions to proceed to an alternative indoor location.
-

STAND BY is appropriate for all disasters or emergencies, except those that occur without warning. **STAND BY** must be followed by another ACTION or the **ALL CLEAR** instruction to return to normal school activities.

ANNOUNCEMENT:

1. Make an announcement in person directly or over the public address system:

Example: **"Attention please. (Pause) STAND BY. (Pause) STAND BY. (Pause) STAND BY. (Pause) Additional information will follow."**

2. Use messengers with oral or written word as an alternate means of faculty notification.
3. Use Parent Telephone Alert System, if appropriate.

STAFF ACTIONS:

- If outside, teachers are to return students to their classrooms.
 - If inside, teachers will hold students in classrooms pending receipt of further instructions.
 - STAND BY** must be followed by another ACTION or **ALL CLEAR** instruction to return to normal school activities.
-

EMERGENCY ACTION

CONVERT SCHOOL

CONVERT SCHOOL is implemented during a disaster when a requirement exists for community medical facilities or shelters. **CONVERT SCHOOL** will be initiated only by the Superintendent and/or upon the request of officials from the Department of Health and Human Services or the American Red Cross as arranged by a prior written Memorandum of Understanding between the school district and the public agency. This action is normally preceded by another ACTION such as **EVACUATION**. If the Red Cross chooses a school as a community shelter, it will arrange shelter set-up. After an earthquake, potential shelter locations are checked by a local building inspector approved by local government authorities before a determination is made to use the school site as a shelter.

ANNOUNCEMENT:

During School Hours

1. Make the following announcement in person directly or over the public address system:

<p><u>Example:</u> "Attention please. (Pause) CONVERT SCHOOL. (Pause) CONVERT SCHOOL. (Pause) Thank you."</p>

Other than School Hours

2. Use the School Personnel Telephone Notification System to notify all school employees.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

During School Hours

- Dismiss all classes or, if the situation dictates, hold students at school for temporary care.
- Convert the school into an Emergency Hospital, First Aid Station or community shelter for congregate care. (Community shelter is operated by the Department of Health and Human Services or the American Red Cross.)
- When converting the school to an Emergency Hospital or First Aid Station, follow the guidance and directions of the medical personnel upon their arrival.

Other than School Hours

- Alert school employees through the School Personnel Alerting System.
 - Suspend scheduled classes. Use Telephone Alert System and Parent Notification System. Notify District Office for assistance by other means.
 - Convert of the school into an emergency hospital, vaccination station (operated by the Department of Health and Human Services or community shelter (operated by the American Red Cross.)
 - When converting the school to an Emergency Hospital or First Aid Station, follow the guidance and directions of the medical personnel upon their arrival.
-

EMERGENCY ACTION

DIRECTED TRANSPORTATION

DIRECTED TRANSPORTATION is implemented when students and staff are loaded into school buses, cars and any other available means of transportation and moved from a dangerous area to an area of lesser danger. This ACTION will normally be preceded by **STAND-BY, EVACUATION** or another ACTION. **DIRECTED TRANSPORTATION** is considered appropriate for, but is not limited to, the following types of emergencies:

- Chemical accident
- Fire
- Flood

ANNOUNCEMENT:

1. Make the following announcement in person directly or over the public address system:

Example: "Attention please. (Pause) **DIRECTED TRANSPORTATION when dismissal bell rings.** (Pause) **DIRECTED TRANSPORTATION when dismissal bell rings.** (Pause) Thank you."

2. Use messengers with oral or written word as an alternate means of staff notification.
3. Use Parent Telephone Notification System, if time permits.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

Prior to implementing **DIRECTED TRANSPORTATION**, determine the following:

- Who is assigned to each loading area? _____
- Where are loading areas? _____
- What, if any, change in vehicle traffic patterns are necessary? _____

- What staff supervises this ACTION, and where? _____
- How can sufficient transportation be arranged to accommodate the entire student population and staff? _____

TEACHER ACTIONS:

- Take attendance before leaving the campus.
- Upon arrival at the safe site, take attendance again after students exit the bus.
- Report attendance to the Principal/designee.
- Keep students together. Remain calm.

BUS DRIVER ACTIONS:

- Take the safest route to the pre-identified evacuation sites.
 - Avoid dangers such as driving through flooded roads, crossing over swollen creeks, etc.
-

STUDENT ACTIONS:

- ❑ Remain quiet and seated while on the bus.
- ❑ Keep head, hands, backpacks, *etc.* away from the open windows.
- ❑ Stay together at the alternate site. Remain calm.
- ❑ Report any injuries or problems to teachers or staff members.

To evacuate by other vehicles

If buses are unable to get to the campus quickly or not enough are available, consider other modes of transportation. A list should be developed of school owned vehicles, staff vehicles and parent vehicles that are available. **This method of evacuation should only be used in extreme emergency since there is a great potential to lose track of the students.**

- ❑ Drivers should take the safest route to the pre-identified evacuation sites.
 - ❑ Account for all students before transportation occurs and after arrival at the safe site.
-

EMERGENCY ACTION

OFF-SITE EVACUATION

OFF-SITE EVACUATION is implemented when it is unsafe to remain on the school campus, and evacuation to an off-site assembly area is required. This ACTION provides for the orderly movement of students and staff along prescribed routes from inside school buildings to a designated area of safety. **OFF-SITE EVACUATION** is considered appropriate for, but is not limited to, the following types of emergencies:

- Fire
- Bomb threat
- Chemical accident
- Explosion or threat of explosion
- Post earthquake

OFF-SITE EVACUATION may require **DIRECTED TRANSPORTATION**.

See also **EVACUATION** and **REVERSE EVACUATION**, implemented when it is unsafe to remain outside.

ANNOUNCEMENT:

1. Fire alarm (bell or horn signal).
2. Make an announcement over the public address system:

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- Determine the safest method for evacuating the campus. This may include the use of school buses or simply walking to the designated off-site location.
- Call 911. Provide school name and location of off-site evacuation, reason for evacuation, number of staff and students being evacuated.
- When clearance is received from appropriate agencies, give the **ALL CLEAR** instruction and authorize students and staff to return to the classrooms.
- Send home with students for their parents/guardians a brief written description of the emergency, how it was handled and, if appropriate, what steps are being taken in its aftermath.

STAFF ACTIONS:

- Take attendance before leaving campus. Instruct students to evacuate the building, following designated routes, and assemble in their assigned offsite Assembly Area. Bring along the emergency classroom backpack.
 - If walking to a nearby site, keep students lined up in an orderly fashion and walk away from the danger. The procession should follow the safest route to the evacuation site.
 - Take the student roster when leaving the building. Take attendance when the class is reassembled in a safe offsite location. Report attendance to Principal/designee.
 - Remain in place until further instructions are given.
-

EMERGENCY ACTION

REVERSE EVACUATION

REVERSE EVACUATION is implemented when it is unsafe to remain outside the campus and staff and students must immediately return indoors. This ACTION is considered appropriate for, but is not limited to, the following types of emergencies:

- Chemical accident
- Flood
- Explosion
- Rabid animal on campus

See also **EVACUATION** and **OFF-SITE EVACUATION**, when it is unsafe to remain on campus.

ANNOUNCEMENT:

1. Make an announcement over the public address system or in person directly:

<p><u>Example:</u> "Attention please. We need to institute a REVERSE EVACUATION. Staff and students should move inside as quickly and orderly as possible. Students are to return to their [current or previous] classroom."</p>

PRINCIPAL/SITE ADMINISTRATOR:

- ❑ Determine a safe inside location on the school campus for parents, visitors and contractors on campus when the emergency occurs.
- ❑ When clearance is determined or received from appropriate agencies that it is safe to be outdoors, announce **ALL CLEAR** to resume school activities.
- ❑ Send home with students for their parents/guardians a brief written description of the emergency, how it was handled and, if appropriate, what steps are being taken in its aftermath.

STAFF ACTIONS:

- ❑ Instruct students to return to the building and their current classroom or the previous one they attended. Remind them to enter the building in an orderly and quiet manner.
 - ❑ Take attendance when the class is reassembled in the classroom. Report attendance to the Incident Commander/designee.
 - ❑ Remain in the classroom until further instructions are given.
 - ❑ Wait for another ACTION or the **ALL CLEAR** instruction to return to school buildings and normal class routine.
-

EMERGENCY ACTION

STUDENT RELEASE

Certain situations may involve releasing students from school or relocating them at a time when parents expect their children to be at the school site. Student release will be implemented by a school administrator in times of extreme emergency that warrant its execution. Whenever possible, it is preferred that students remain at school during the academic day.

FOUR STEPS FOR STAFF

1. At REQUEST TABLE, verify parent ID and authorization.
2. Direct parent to RELEASE TABLE; radio or send runner for student.
3. At RELEASE TABLE, verify Student Request Form is signed
4. Release student to custody of authorized adult.

FOUR STEPS FOR PARENTS

1. Fill out Student Request Form.
2. Show photo ID at REQUEST TABLE.
3. Move to RELEASE TABLE to wait for student.
4. Leave campus immediately after student is released to your custody.

INCIDENT COMMANDER (PRINCIPAL/SITE ADMINISTRATOR) ACTIONS:

- Set up Incident Command Post (ICP).
- Notify staff of school evacuation and communicate that this is not a drill.
- Designate the Student Assembly Area or direct teachers to a pre-designated spot. Analyze situation; re-evaluate evacuation spot to determine if students should be moved.
- Determine medical and assistance needs after population assessment. Determine search and rescue needs.
- Reassess as situation changes. Reassign emergency teams as needed.
- Keep staff informed as to status of missing students.

TEACHER and STAFF ACTIONS:

- Evacuate students to designated area, with students grouped as determined by district or school site.
- Take roll by distributing pre-labeled nametags to each student.
- Report population assessment to Incident Commander by holding up green or red card. Mark undistributed nametags with student status beside name:
A = Absent
M = Medical; students taken to the First Aid station
U = Missing/Unaccounted
- Send undistributed nametags to the Student Request Table.
- Organize students. Monitor students' medical and emotional condition.
- Extra staff should partner for other assigned duties; report to Command Post.

TEAM ASSIGNMENTS

STUDENT RELEASE TEAM

- Take supplies to designated Request/Release Table locations.
 - Set out tables at least 20 feet apart to reduce crowding. For large student body, establish several lines at the Request Table for speedier processing.
-

- ❑ Post signs and set out file boxes of Student Emergency Cards for each line. Identify volunteer runners and review where to find students.
- ❑ Wear identifying vests or hats.
- ❑ Distribute clipboards with Student Request Forms to parents in line.
- ❑ Set out white board for special instructions and parent requests.
- ❑ Pull cards of absent, injured and missing students. Note status on those cards and file at back of file box.

TRAFFIC CONTROLLER (Staff members and/or parent volunteers):

- ❑ Set out parking area directional signs and enlarged site map with walking path designated for parents picking up students.
- ❑ Set out traffic cones to cordon off parking for emergency vehicles.
- ❑ Maintain order in parking areas; direct cars away from areas for emergency vehicles.
- ❑ Report to Incident Command Post any crowd control issues in parking lot and on school grounds.
- ❑ For schools with no room for parent parking and turnaround, develop a procedure that enables students to be released directly to the authorized adult's vehicle.

PARENT INFORMATION REPRESENTATIVE (Staff or trained volunteer):

- ❑ Provide information about student release procedures to parents.
- ❑ Maintain white board with special information.
- ❑ Learn which students need medical attention and attempt to locate their parents.

CRISIS INTERVENTION COUNSELOR (Health practitioner)

- ❑ Maintain order at Student Request Table; calm agitated parents and students.
- ❑ Facilitate delivery of information to parents of students with special circumstances (e.g. missing, injured, deceased).
- ❑ Escort parents to First Aid Station to reunite with injured students.

RUNNERS (Staff, students and/or parent volunteers - number depends on size of campus)

- ❑ Take Student Request Form to Student Assembly Area to find requested student. Alternately, a walkie-talkie may be used to request a student from the Assembly Area.
- ❑ Retrieve student and escort him/her to Student Release Table -OR- return to Student Request Table with status information on those who are not in the Student Assembly Area.

EMERGENCY ACTION

TAKE COVER

TAKE COVER is implemented when it is necessary to move to and take refuge in the best-shielded areas within the school buildings. It is appropriate for, but not limited to, the following:

- Actual enemy attack or imminent threat of attack
- Severe windstorm with little or no warning

Enemy Attack

ANNOUNCEMENT:

1. A three (3) minute undulating siren tone will sound for schools near an Attack Warning Siren.
2. If not near an Attack Warning Siren, make the following announcement in person directly or over the school public address system:

3. Sound continuing short buzzer or bell signals.
4. Use messengers with oral or written word as an alternate means of faculty notification.

Natural Disasters

ANNOUNCEMENT:

1. Make the following announcement in person directly or over the school public address system:

2. Sound continuing short buzzer or bell signals.
3. Use messengers with oral or written word as an alternate means of faculty notification.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- Give clear instructions, remain calm and convey reassurance.
 - When clearance is received from appropriate agencies, give another ACTION instruction or the **ALL CLEAR** to indicate that the normal school activities can resume.
 - Send home with students for their parents/guardians a brief written description of the emergency, how it was handled and, if appropriate, what steps are being taken in its aftermath.
-

E. EMERGENCY RESPONSES

This section establishes procedures to be followed that will minimize or nullify the effects of the 44 emergencies listed below. The response procedures are intended primarily as a ready reference for all staff to be studied and practiced prior to the occurrence of an emergency.

The emergencies outlined in this section are:

○ Accident at School	III-23
○ Aircraft Crash	III-24
○ Air Pollution Alert	III-26
○ Allergic Reaction	III-27
○ Animal Disturbance	III-28
○ Biological Agent Release	III-29
○ Bomb Threat	III-31
○ Bus Accident	III-34
○ Chemical Accident (offsite)	III-36
○ Chemical Accident (onsite)	III-37
○ Civil Disobedience	III-38
○ Criminal Act	III-40
○ Death of a Student	III-41
○ Death of a Staff Member	III-42
○ Dirty Bomb	III-43
○ Earthquake	III-45
○ Explosion.....	III-47
○ Fire (offsite)	III-48
○ Fire (onsite)	III-49
○ Flood	III-50
○ Gas Odor/Leak.....	III-51
○ Hazardous Materials	III-52
○ Hostage Situation	III-53
○ Intruder	III-54
○ Irrational Behavior	III-55
○ Kidnapping	III-56
○ Medical Emergency	III-57
○ Missing Student	III-58
○ Motor Vehicle Crash.....	III-60
○ Pandemic Influenza	III-60
○ Poisoning / Contamination	III-62
○ Public Demonstration	III-63
○ Sexual Assault	III-64
○ Shooting	III-65
○ Storm/Severe Weather	III-67
○ Student Riot	III-68
○ Suicide Attempt	III-69
○ Suspicious Package	III-70
○ Terrorist Attack/War	III-71
○ Threat Level Red.....	III-72
○ Threats/Assaults	III-73
○ Tsunami	III-74
○ Utility Failure	III-76
○ Weapon	III-77

INCIDENTS OF VIOLENCE ON CAMPUS

Several of the following emergency scenarios involve an incident of violence on campus. When such an emergency occurs, it is essential that the safety and welfare of students and staff are addressed. This includes the provision of support and counseling immediately and in the longer term. The guidelines below should be followed by the principal and other key personnel.

WITHIN 24 HOURS

- Gather the facts
- Ensure appropriate intervention to minimize additional injury
- Provide first aid where necessary
- Ensure the safety and welfare of students and staff
- Set up an Emergency Operations Center, if appropriate
- Contact the District Office to report the critical incident
- Assess the need for support and counseling for those directly and indirectly involved
- Manage the media (Public Information Officer/Principal)
- Set up a recovery room
- Provide factual information to staff, students and the school community
- Ensure that the privacy of students and staff is maintained
- Organize assistance such as transport home

WITHIN 48-72 HOURS

- Debrief all relevant persons
- Arrange counseling as needed
- Provide opportunities for staff and students to talk about the incident
- Continue to provide updates to staff, students and the school community.
- Act to dispel rumors
- Restore normal functioning and service delivery as soon as possible
- Where necessary, make arrangements to cover classes, arrange leave and employ temporary substitute teachers
- Implement protocols for a student or staff member, if required

WITHIN THE FIRST MONTH

- Note student and staff behavioral changes such as reports that individuals cannot sleep, uncharacteristic difficulty coping with work, easily agitated. Where these occur, encourage referral to appropriate support services
 - Maintain school contact with hospitalized students and staff
-

EMERGENCY RESPONSE

ACCIDENT AT SCHOOL

Whether an accident is unintentional and results in minor injury or is the result of aggressive behavior on campus, it is important to complete a written report of the incident. Accident Report and Behavioral Incident Report forms are available at the school office.

STAFF ACTIONS:

- θ Report accident to principal and school office.
- θ Provide for immediate medical attention, including performing necessary life-sustaining measures (CPR, etc.), until trained Emergency Medical Services technicians arrive.
- θ For relatively minor events, take students to school office or school nurse for assistance.
- θ Complete an Accident Report or Behavioral Incident Report to document what occurred.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Provide appropriate medical attention. Call 911, if needed.
- θ Contact parents, guardians as appropriate to seek appropriate follow-up services, if needed.

OTHER PREVENTATIVE/SUPPORTIVE ACTIONS:

- θ Post general procedures in the clinic explaining when parents are to be notified of minor mishaps.
- θ Provide staff with a one-page list of emergency procedures in case of an accident or injury on the playground or in the building (e.g., First Aid Manual, Bloodborne Pathogen Program).
- θ Provide each teacher with information about students in his/her classroom having special medical or physical needs; such conditions might include allergies, fainting, seizures, or diabetes; include procedures that the teacher may follow in these specific emergencies.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

Emergency response will depend on the size of the aircraft, nature of the crash, and proximity to the school. If it is safe to remain inside the building, all students should be kept in the school under supervision. The crash may also result in an explosion, chemical spill or utility interruption.

Aircraft crashes into the school

STAFF ACTIONS:

- θ Notify Principal.
- θ Move students away from immediate vicinity of the crash.
- θ **EVACUATE** students from the building using primary and/or alternate fire routes to a safe assembly area away from the crash scene. Take class roster/nametags and emergency backpack.
- θ Check school site to assure that all students have evacuated.
- θ Take attendance at the assembly area.
- θ Report missing students to the Principal /designee and emergency response personnel.
- θ Maintain control of the students a safe distance from the crash site.
- θ Care for the injured, if any.
- θ Escort students back to the to the school site when emergency response officials have determined it is safe to return to the building.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Notify police and fire department (call 911).
 - θ Determine immediate response procedures, which may include **EVACUATION, OFF-SITE EVACUATION** or **DIRECTED TRANSPORTATION**.
 - θ Notify District Superintendent, who will contact the Office of Emergency Services.
 - θ Arrange for first aid treatment and removal of injured occupants from building.
 - θ Secure area to prevent unauthorized access until the Fire Department arrives. Ensure that students and staff remain at a safe distance from the crash.
 - θ Account for all building occupants and determine extent of injuries.
 - θ Do not re-enter building until the authorities provide clearance to do so.
-

Aircraft crashes near school

STAFF ACTIONS:

- θ Notify Principal.
- θ Move students away from immediate vicinity of the crash.
- θ Remain inside with students unless subsequent explosions or fire endanger the building.

\PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Notify police and fire department (call 911).
- θ Initiate **SHELTER IN PLACE**, if warranted.
- θ Initiate **REVERSE EVACUATION** for students and staff outside or direct them to designated area until further instructions are received.
- θ Ensure that students and staff remain at a safe distance from the crash.
- θ Notify District Superintendent, who will contact the Office of Emergency Services.
- θ Fire department officials will secure area to prevent unauthorized access. Do not enter affected areas until the appropriate authorities provide clearance to do

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

EMERGENCY RESPONSE

AIR POLLUTION ALERT

Severe air pollution may affect students and staff who are susceptible to respiratory problems.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Develop and maintain a file of students and staff who have or are susceptible to respiratory problems. The file should contain data on the location of such persons at different times during the day.
- θ Meet with physical education teachers and other teachers directing strenuous activity programs and determine alternate programs available during an air pollution episode.
- θ When notified by the district office or news media of a smog advisory, inform all staff to stay indoors and minimize physical activity.
- θ Cancel all athletic competitions and practices and any other activities that require strenuous physical activity such as marching band, pep squad etc.
- θ Instruct employees to minimize strenuous physical activity.
- θ Cancel any events that require the use of vehicles.
- θ Urge staff and high school students to minimize use of vehicles.

STAFF ACTIONS:

- θ Remain indoors with students.
- θ Minimize physical activity.
- θ Keep windows and doors closed.
- θ Resume normal activities after the All Clear signal is given.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

EMERGENCY RESPONSE**ALLERGIC REACTION**

There are many types of medical conditions that may trigger an allergic reaction, among them anaphylactic shock, diabetes and sickle cell anemia. Possible symptoms of an allergic reaction include skin irritation or itching, rash, hives, nasal itching or sneezing, localized swelling, swollen tongue, restlessness, sweating, fright, shock, shortness of breath, vomiting, cough and hoarseness. School nurses have a specialized health care plan for certain conditions and should be contacted for any sign of allergic reaction.

STAFF ACTIONS:

- θ If imminent risk, call 911.
- θ Send for immediate help (First Aid, CPR, medical) and medication kit (for known allergies).
- θ Notify principal.
- θ Assist in getting "Epi" (Epinephrine) pen for individuals who carry them (usually in backpack), and prescription medications (kept by school nurse).
- θ If an insect sting, remove stinger immediately.
- θ Assess situation and help student/staff member to be comfortable.
- θ Move student or adult only for safety reasons.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ If imminent risk, call 911 (always call 911 if using "Epi" pen).
- θ Notify parent or guardian.
- θ Administer medication, by order of a doctor, if appropriate; apply ice pack to affected area, keep victim warm or take other actions as indicated.
- θ Observe for respiratory difficulty.
- θ Attach a label to the person's clothing indicating: time & site of insect sting or food ingested, name of medicine, dosage and time administered.

OTHER PREVENTATIVE/SUPPORTIVE ACTIONS:

- θ Keep an "Epi" pen in the school office and notify staff as to location.
- θ Emergency health card should be completed by parents for each child and should be easily accessible by school personnel.
- θ Provide bus drivers with information sheets for all known acute allergic reactors.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____

EMERGENCY RESPONSE

ANIMAL DISTURBANCE

If there is a rabid or uncontrollable animal on campus, implement this procedure when any wild animal threatens the safety of the students and staff

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Isolate the students from the animal. Close doors and lock tables as a means to isolating the animal.
- θ If the animal is outside, keep students inside and institute a **LOCKDOWN**.
- θ If the animal is inside, initiate an **EVACUATION** outside to a protected area away from the animal
- θ Contact the Sonoma Humane Society for assistance in removing the animal.
- θ If the animal injures anyone, seek medical assistance from the school nurse.
- θ Notify parent/guardian and recommended health advisor.

STAFF/TEACHER ACTIONS:

- θ If the animal is outside, keep students inside. Lock doors and keep students away from the windows.
- θ If the animal is inside, **EVACUATE** students to a sheltered area away from the animal.
- θ Notify the principal if there are any injuries.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

EMERGENCY RESPONSE BIOLOGICAL AGENT RELEASE

This is an incident involving the discharge of a biological substance in a solid, liquid or gaseous state. Such incidents may include the release of radioactive materials. A biological agent can be introduced through:

- postal mail, via a contaminated letter or package
- a building's ventilation system
- a small explosive device to help it become airborne
- a contaminated item such as a backpack, book bag, or other parcel left unattended
- the food supply
- aerosol release (for example, with a crop duster or spray equipment)

Defense against biological release (e.g. anthrax, smallpox, plague, ricin etc.) is difficult because usually appear after some time has lapsed. Indicators that may suggest the release of a biological or chemical substance include multiple victims suffering from: watery eyes, choking or breathing difficulty, twitching or the loss of coordination. Another indicator is the presence of distressed animals or dead birds. Determine which scenario applies and implement the appropriate response procedures.

Outside the building

STAFF ACTIONS:

- θ Notify principal.
- θ Move students away from immediate vicinity of danger (if outside, implement **REVERSE EVACUATION**).
- θ Segregate individuals who have been topically contaminated by a liquid from unaffected individuals. Send affected individuals to a designated area medical attention.
- θ Follow standard student assembly, accounting and reporting procedures.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Initiate **SHELTER IN PLACE**.
 - θ Shut off HVAC units.
 - θ Move to central location where windows and doors can be sealed with duct tape.
 - θ Call 911. Provide location and nature of the emergency and school actions taken.
 - θ Notify District Superintendent of the situation.
 - θ Turn on a battery-powered commercial radio and listen for instructions.
 - θ Complete the Biological and Chemical Release Response Checklist
 - θ Remain inside the building until the Department of Health or Fire Department determines it is safe to leave.
 - θ Arrange for psychological counseling for students and staff.
-

Inside the building

STAFF ACTIONS:

- θ Notify principal or site administrator.
- θ Segregate individuals who have been topically contaminated by a liquid from unaffected individuals.
- θ Implement **EVACUATION** or **OFF-SITE EVACUATION**, as appropriate. Send affected individuals to a designated area for medical attention.
- θ Follow standard student assembly, accounting and reporting procedures.
- θ Prepare a list of those who are in the affected area to provide to emergency response personnel.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Initiate **EVACUATION** of building or **OFF-SITE EVACUATION** to move students away from immediate vicinity of danger.
- θ Move up-wind from the potential danger.
- θ Call 911. Provide exact location and nature of emergency.
- θ Designate security team to isolate and restrict access to potentially contaminated areas.
- θ Wait for instructions from emergency responders-- Health or Fire Department.
- θ Notify District Superintendent of the situation.
- θ Arrange for immediate psychological counseling for students and staff.
- θ Complete the Biological and Chemical Release Response Checklist
- θ Wait to return to the building until it has been declared safe by local HazMat or appropriate agency.

THOSE WHO HAVE DIRECT CONTACT WITH BIOLOGICAL AGENT:

- θ Wash affected areas with soap and water.
- θ Immediately remove and contain contaminated clothing
- θ Do not use bleach on potentially exposed skins.
- θ Remain in safe, but separate area, isolated from those who are unaffected, until emergency response personnel arrive.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

In the event that the school receives a bomb threat by telephone, follow the Bomb Threat Checklist on the next page to document information about the threat. Keep the caller on the telephone as long as possible and listen carefully to all information the caller provides. Make a note of any voice characteristics, accents, or background noises and complete the Bomb Threat Report as soon as possible.

PERSON RECEIVING THREAT BY TELEPHONE:

- θ Listen. Do not interrupt caller.
- θ Keep the caller on the line with statements such as *"I am sorry, I did not understand you. What did you say?"*
- θ Alert someone else by prearranged signal to notify the telephone company to trace the call while the caller is on the line.
- θ Notify site administrator immediately after completing the call.
- θ Complete the Bomb Threat Checklist.

Telephone Bomb Threats

- Remain calm/courteous.
- Read phone's visual display.
- Listen, don't interrupt.
- Keep caller talking. Pretend hearing difficulty.
- Notice details: background noises, voice description.
- Ask: When? Where? What? How?
- Don't touch any suspicious objects.

Call 911**PERSON RECEIVING THREAT BY MAIL:**

- θ Note the manner in which the threat was delivered, where it was found and who found it.
- θ Limit handling of item by immediately placing it in an envelope so that fingerprints may be detected. Written threats should be turned over to law enforcement.
- θ Caution students against picking up or touching any strange objects or packages.
- θ Notify principal or site administrator.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Call 911.
 - θ If the caller is still on the phone, contact the phone company to trace the call. Tell the telephone operator the name of school, name of caller, phone number on which the bomb threat came in. This must be done quickly since the call cannot be traced once the caller has hung up.
 - θ Instruct staff and students to turn off any pagers, cellular phones or two-way radios. Do not use those devices during this threat since explosive devices can be triggered by radio frequencies.
-

- θ Determine whether to evacuate the threatened building and adjoining buildings. If the suspected bomb is in a corridor, modify evacuation routes to bypass the corridor.
- θ Use the intercom, personal notification by designated persons, or the PA system to evacuate the threatened rooms.
- θ If it is necessary to evacuate the entire school, use the fire alarm.
- θ Notify the District Superintendent of the situation.
- θ Direct a search team to look for suspicious packages, boxes or foreign objects.
- θ Do not return to the school building until it has been inspected and determined safe by proper authorities.
- θ Avoid publicizing the threat any more than necessary.

SEARCH TEAM ACTIONS:

- θ Use a systematic, rapid and thorough approach to search the building and surrounding areas.
- θ Check classrooms and work areas, public areas (foyers, offices, bathrooms and stairwells), unlocked closets, exterior areas (shrubbery, trash cans, debris boxes) and power sources (computer rooms, gas valves, electric panels, telephone panels).
- θ If suspicious item is found, make no attempt to investigate or examine object.

STAFF ACTIONS:

- θ Evacuate students as quickly as possible, using primary or alternate routes.
- θ Upon arrival at the designated safe site, take attendance. Notify the principal/site administrator of any missing students.
- θ Do not return to the building until emergency response officials determine it is safe.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

EMERGENCY RESPONSE BOMB THREAT CHECKLIST

To be completed by person receiving the call

CALL RECEIVED BY: _____ DATE _____ TIME _____

REMAIN CALM! Notify other staff by prearranged signal while caller is on the line. Listen.
Do not interrupt the caller except to ask:

Words used by caller: _____

Description of caller: Male Female Adult Juvenile

Estimate age of caller: _____ Other notes: _____

Voice characteristics: Loud Soft Deep High Pitched
 Raspy Pleasant Intoxicated Nasal
Other _____

Speech: Rapid Slow Disguised Normal
 Laughing Slurred Lisp Stutter
Other _____

Manner: Calm Angry Irrational Excited
 Coherent Incoherent Deliberate Crying
 Emotional Righteous Laughing Foul

Language: Excellent Good Fair Poor
Use of certain phrases: _____

Accent: Local Foreign Regional
Other _____

Background Noises: Airplane Animals Industrial Machines
 Static Motors Office Machines
 Quiet Music Party Scene
 Street Traffic Trains PA System

EMERGENCY RESPONSE

BUS ACCIDENT

Each school should maintain a folder for each bus serving the school. This folder should contain rosters, including an emergency telephone number for each student assigned to ride the bus. The teacher in charge of a special activity trip should prepare trip bus folders; one copy of the student emergency contact information should be placed in the trip folder and a second copy should accompany the teacher on the trip. Bus drivers may need to make spontaneous, independent decisions, base don the nature of the emergency, age of children, location of bus and other unique circumstances.

BUS DRIVER:

- θ Turn off power, ignition and headlights. Use safety lights, as appropriate.
- θ Evaluate the need for evacuation.
- θ Remain with the vehicle. Notify California Highway Patrol.

STAFF ACTIONS AT THE SCENE:

- θ Call 911, if warranted.
- θ Notify principal.
- θ Implement basic first aid until emergency medical services and/or law enforcement arrives and takes charge of the emergency.
- θ Move all uninjured students to a safe distance from the accident.
- θ Document the names of all injured students and their first aid needs.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Notify law enforcement.
- θ Notify parents/guardians of all students on the bus as soon as accurate information is available.
- θ Designate a school staff representative to proceed to any medical treatment facility to which an injured student has been taken to assist parents and provide support to students, as appropriate.
- θ Notify school community about the incident and status of injured students and/or staff. Prepare news release for media, if appropriate.

Earthquake during bus trip

BUS DRIVER ACTIONS:

- θ Issue DUCK, COVER and HOLD ON instruction.
 - θ Stop bus away from power lines, bridges, overpasses, buildings, possible landslide conditions, overhanging trees or other dangerous situations.
 - θ Set brake, turn off ignition and wait for shaking to stop.
-

- θ Check for injuries and provide first aid, as appropriate.
- θ Contact the school administrator and bus dispatch to report location and condition of students and the bus.
- θ Do not attempt to cross bridges, overpasses or tunnels that may have been damaged.
- θ If instructed to continue route,
- θ Enroute to school, continue to pick up students.
- θ Leaving school, continue dropping off students, provided there is a responsible adult at the bus stop.
- θ If it is impossible to return to school, proceed to nearest designated shelter indicated on the bus route. Upon arriving at the shelter, notify the school administrator.
- θ Remain with students until further instructions are received from site administrator.
- θ Account for all students and staff throughout the emergency

Flood during bus trip

BUS DRIVER ACTIONS:

- θ Do not drive through flooded streets and/or roads.
- θ Take an alternate route or wait for public safety personnel to determine safe route.
- θ If the bus is disabled, stay in place until help arrives
- θ Contact the school administrator and bus dispatch to report location and condition of students and the bus.
- θ Do not attempt to cross bridges, overpasses or tunnels that may have been damaged.
- θ Account for all students and staff throughout the emergency.

ADDITIONAL STEPS:

- _____
- _____
- _____
- _____

EMERGENCY RESPONSE CHEMICAL ACCIDENT (offsite)

Chemical accidents the magnitude of a disaster could result from a transportation accident or an industrial spill, involving large quantities of toxic material.

PERSON DISCOVERING SPILL:

- θ Alert others in immediate area to leave the area.
- θ Close doors and restrict access to affected area.
- θ Notify principal/site administrator.
- θ DO NOT eat or drink anything or apply cosmetics.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Notify Fire Department and the Department of Public Health. Provide the following information:
 - School name and address, including nearest cross street(s)
 - Location of the spill and/or materials released
 - Characteristics of spill (color, smell, visible gases)
 - Name of substance, if known
 - Injuries, if any
- θ Notify Maintenance/Building and Grounds Manager.
- θ Determine whether to implement **SHELTER IN PLACE, EVACUATION** and/or student release.
- θ Post a notice on the school office door stating location of alternate school site.
- θ Notify District Superintendent of school status and location of alternate school site.

STAFF ACTIONS:

- θ If **SHELTER-IN-PLACE**, close all doors and windows, shut off ventilation, and monitor the radio. If necessary, use tape, rags, clothing or any other available material of seal air leaks.
- θ If you believe that gas is entering the building, protect everyone with a wet cloth or towel over the mouth and nose. Have everyone breathe in short, quick shallow breaths.
- θ If **EVACUATION** is implemented, direct all students to report to nearest designated building or assembly area.
- θ Upon arrival at safe site, take attendance to be sure all students have been evacuated and accounted for. Notify principal/site administrator of any missing students.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____

EMERGENCY RESPONSE CHEMICAL ACCIDENT (onsite)

This incident could be the result of spilled cleaning chemicals within the school building, in the school lab, a material a student brings to school, or a broken gas main. Any such accidents could endanger the students and staff. Hazardous material spills may occur inside a building, such as a spill in a chemistry lab.

PERSON DISCOVERING SPILL:

- θ Alert others in immediate area to leave the area.
- θ Close windows and doors and restrict access to affected area.
- θ Notify principal/site administrator.
- θ DO NOT eat or drink anything or apply cosmetics.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Notify Fire Department and the Department of Public Health. Provide the following information:
 - School name and address, including nearest cross street(s)
 - Location of the spill and/or materials released; name of substance, if known
 - Characteristics of spill (color, smell, visible gases)
 - Injuries, if any
 - Your name and telephone number
- θ Notify Maintenance/Building and Grounds Manager to shut off mechanical ventilating systems.
- θ If necessary, proceed with school **EVACUATION** using primary or alternate routes, avoiding exposure to the chemical fumes.
- θ Post a notice on the school office door stating location of alternate school site.
- θ Notify District Superintendent of school status and location of alternate site.
- θ Send home with students for their parents/guardians a brief written description of the emergency, how it was handled and, if appropriate, what steps are being taken in its aftermath.

STAFF ACTIONS:

- θ If **EVACUATION** is implemented, direct all students to report to nearest designated building or assembly area. Take class roster and emergency backpack and student kits. Check that all students have left the building. Students are not to be left unattended at any time during evacuation process. Students are to remain quiet during evacuation.
 - θ Upon arrival at evacuation site, take attendance. Notify principal/site administrator of any missing students.
 - θ Upon arrival at evacuation site, take roll and report attendance to Principal immediately. Notify emergency response personnel of any missing students.
-

- θ Do not return to the building until emergency response personnel have determined it is safe.

EMERGENCY RESPONSE

CIVIL DISTURBANCE

A civil disturbance is an unauthorized assemblage on the school grounds with the potential to:

- disrupt school activities;
- cause injury to staff and students; and/or
- damage property.

Precautionary measures must be taken to keep school personnel and students from undue exposure to danger. Efforts should be made to remain calm, to avoid provoking aggression, and to keep students in their classrooms.

Inside School

STAFF ACTIONS:

- θ Report disruptive circumstances to principal/site administrator.
- θ Avoid arguing with participant(s).
- θ Have all students and employees leave the immediate area of disturbance.
- θ Lock doors. Account for all students and remain in classroom unless instructed otherwise by the principal or law enforcement.
- θ Stay away from windows and exterior doors.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ If the students are engaging in civil disobedience, keep the students confined to one room in the school building.
- θ Set up a communication exchange with the students, staff and principal. Try to restore order.
- θ If unable to calm students and violent or uncontrolled behavior is probably, notify police of situation and request assistance.
- θ Send home with students for their parents/guardians a brief written description of the emergency, how it was handled and, if appropriate, what steps are being taken in its aftermath.

Outside of School

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Call 911.
 - θ Move any students who are outside into the school building. If unable to do so, have students lie down and cover their heads.
 - θ Once students are in the school building, lock and secure all exterior doors, including restrooms. Have custodians remove trash containers and other burnable items from public access.
 - θ Cancel all outside activities.
 - θ Maintain an accurate record of events, conversations and actions.
-

- θ Assign staff members to assist nurse as necessary.

STAFF ACTIONS:

- θ Close and lock classroom doors. Close all curtains and blinds. Keep students away from windows and take precautions to protect them from flying glass in the event windows are broken.
- θ Instruct students to **DUCK AND COVER**, lie on the floor and keep students calm.
- θ Care for the injured, if any.
- θ Remain with students within locked classrooms until all clear is given, regardless of bells and the school schedule.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

EMERGENCY RESPONSE

CRIMINAL ACT

Criminal acts on campus may vary from theft to rape. Sexual assault and threats are covered separately, later in this section.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Notify police (dial 911).
- θ Identify all parties involved (if possible). Identify witnesses, if any.
- θ Preserve the crime scene. With the exception of rescue personnel, deny access to the immediate area until police arrive. Police officials will coordinate activities within the crime scene and release the area to the school administrator when finished.
- θ If an individual is armed with a weapon, USE EXTREME CAUTION. Do not attempt to remove the weapon from his/her possession. Allow police to do so.
- θ If the incident involves a student, notify the parents or guardians.
- θ Question the victim with another staff member present. Focus on the information necessary to pursue disciplinary action against the perpetrators.
- θ Let trained police obtain specific details about the crime, following student interview protocols.

STAFF ACTIONS:

- θ Care for the victim. Provide any medical attention needed.
- θ Preserve the crime scene. With the exception of rescue personnel, deny access to the immediate area until police arrive

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

EMERGENCY RESPONSE

DEATH of a STUDENT

A student's death may be the result of a suicide, homicide, car accident, illness or other causes. It may have a profound affect on the school and may be one of the most difficult situations an administrator will face. A communications strategy developed in advance of such tragedy will help the administrator know what to say to the student's family and the school community.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Call 911 and the District Office. Verify the death and obtain as much information about it as possible.
- θ Contact the student's family or visit the home to offer condolence and support. Obtain information about the funeral/memorial service. Respect their wishes.
- θ Protect the privacy of the family; the school neither gives nor confirms information to the media or others without consent.
- θ If the death occurred in the evening or weekend, implement the staff phone tree so that teachers and staff members are informed about the occurrence. Notify teachers prior to notification of students.
- θ Meet with front line staff/crisis team as soon as possible so that everyone understands the response plan.
- θ Determine whether additional resources are needed and make appropriate requests.
- θ Schedule a staff meeting as soon as possible to share the details that are known, review procedures for the day and discuss the notification of students, availability of support services and the referral process for students and staff who want or need counseling support and assistance.
- θ Develop a plan for notifying other students and sharing information about availability of support services. Do not use the public address system.
- θ Go to each of the student's classes and notify his/her classmates in person.
- θ Prepare a parent/guardian information letter and distribute it to students at the end of the day.
- θ Contact parents of those students who are affected by the crisis to determine appropriate support needed after leaving school. Offer assistance to parents of impacted students. If necessary, designate areas for crisis team/community resource persons to meet with affected students.
- θ Make arrangements with the family to remove the student's personal belongings from the school.
- θ Meet with your staff/crisis team to evaluate the response and determine what additional resources might be needed. Thank all those who assisted.

STAFF ACTIONS:

- θ Allow students who wish to meet in counseling office or other appropriate place to do so. Encourage students to report any other students who might
-

need assistance. Arrange with facilitator/counselor to individually escort each student to the counseling support site.

EMERGENCY RESPONSE DEATH of a STAFF MEMBER

A reported death or serious illness among the school community may have a profound affect on students and staff alike.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- ∅ Verify the death and obtain as much information about it as possible. Contact the Coroner's Office.
- ∅ Protect the privacy of the family; the school neither gives nor confirms information to the media or others without consent.
- ∅ If the death occurred in the evening or weekend, implement the staff phone tree so that teachers and staff members are informed about the occurrence. Notify teachers prior to notification of students.
- ∅ Contact the decedent's family to offer condolence and support. Obtain information about the funeral/memorial service. Respect the wishes of the family.
- ∅ Meet with front line staff/crisis team as soon as possible so that everyone understands the response plan.
- ∅ Determine whether additional resources are needed and make appropriate requests.
- ∅ Develop a plan for notifying students and sharing information about availability of support services. Do not use the public address system.
- ∅ Schedule a staff meeting as soon as possible to share the details that are known, review procedures for the day and discuss the notification of students, availability of support services and the referral process for staff who want or need support and assistance.
- ∅ Facilitate classroom and small group discussions for students.
- ∅ Prepare a parent/guardian information letter and distribute it to students at the end of the day.
- ∅ Determine who from the decedent's family will secure the personal belongs. Make arrangements to remove the personal belongings from the school after school hours. Do not clean out personal belongings in the presence of students or staff.
- ∅ Meet with your staff/crisis team to debrief at the end of the day and determine what additional resources might be needed.
- ∅ Thank all those who assisted.
- ∅ Continue to monitor staff and students for additional supportive needs.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
-

- _____
- _____

EMERGENCY RESPONSE

DIRTY BOMB

A dirty bomb is a mix of explosives, such as dynamite with radioactive power or pellets, set off to scatter dust and smoke in order to produce radioactive contamination. The main danger from a dirty bomb is from the explosion, which can cause serious injuries and property damage. While the radioactive materials used in a dirty bomb are probably insufficient to create immediate serious illness, they can be dangerous to health if inhaled. Low levels of radiation exposure do not cause noticeable symptoms. Higher levels of radiation exposure may produce nausea, vomiting, diarrhea and swelling and redness of the skin.

Outside, close to the incident.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- ∅ DO NOT MIX POPULATIONS. For those outside at the time of the explosion, initiate **REVERSE EVACUATION** to a separate building or location. Isolate them from those already inside. Do not risk contamination of those inside at the time of the explosion.
- ∅ Call 911. Provide location and nature of the emergency and school actions taken.
- ∅ Set up decontamination station where students and staff may shower or wash with soap and water.
- ∅ Prepare a list of those who are in the affected area to provide to emergency response personnel.
- ∅ Turn on a battery-powered commercial radio and listen for instructions.
- ∅ Notify District Superintendent of the situation.
- ∅ Arrange for medical attention for those injured by the explosion.
- ∅ Arrange for psychological counseling for students and staff.

STAFF ACTIONS:

- ∅ Cover nose and mouth with a cloth to reduce the risk of breathing in radioactive dust or smoke.
 - ∅ Move students quickly to the closest suitable shelter to shield them from radiation. Keep them isolated from individuals inside at the time of the explosion. Do not risk contamination of those who were not outside.
 - ∅ Avoid touching any objects thrown off by the explosion—they might be radioactive.
 - ∅ Follow standard student assembly, accounting and reporting procedures.
 - ∅ Immediately remove outer layer of clothing and mouth cover and seal in a plastic bag, if available. Removing outer clothes may get rid of up to 90% of radioactive dust. Put plastic bag away from the population where others will not touch it until authorities provide further instructions.
 - ∅ Supervise decontamination station where students and staff may shower or wash with soap and water. Do not come into contact with water runoff.
-

- θ Do not return outside after decontamination. Remain in safe area, isolated from those who are unaffected, until emergency response personnel arrive

Inside, close to the incident

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ DO NOT MIX POPULATIONS. For those inside at the time of the explosion, initiate **SHELTER IN PLACE** procedures. Turn off HVAC system.
- θ Move to central location where windows and doors can be sealed with duct tape.
- θ Call 911. Provide location and nature of the emergency and school actions taken.
- θ Turn on a battery-powered commercial radio and listen for instructions.
- θ Notify District Superintendent of the situation.
- θ Remain inside the building until the Department of Health or Fire Department determines it is safe to leave.
- θ Arrange for psychological counseling for students and staff.

STAFF ACTIONS:

- θ Keep students calm. Instruct students to **DUCK and COVER**.
- θ Turn off fans and air conditioning systems. Seal windows and air vents with duct tape. Close all curtains and blinds.
- θ Do not consume water or unpackaged food that was out in the open. Wash the outside of any container before opening it.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

Earthquakes strike without warning. Fire alarms or sprinkler systems may be activated by the shaking. The effect of an earthquake from one building to another will vary. Elevators and stairways will need to be inspected for damage before they can be used. The major shock is usually followed by numerous aftershocks, which may last for weeks.

The major threat of injury during an earthquake is from falling objects, glass shards and debris. Many injuries are sustained while entering or leaving buildings. Therefore, it is important to quickly move away from windows, free-standing partitions and shelves and take the best available cover under a sturdy desk or table, in a doorway or against an inside wall. All other actions must wait until the shaking stops. If persons are protected from falling objects, the rolling motion of the earth may be frightening but not necessarily dangerous.

Inside Building

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Direct inspection and assessment of school buildings. Report building damage and suspected breaks in utility lines or pipes to fire department responders.
- θ Send search and rescue team to look for trapped students and staff.
- θ Post guards a safe distance away from building entrances to assure no one re-enters.
- θ Notify District Office of school and personnel status. Determine who will inform public information media as appropriate.
- θ Do NOT re-enter building until it is determined to be safe by appropriate facilities inspector.
- θ Determine whether to close school. If school must be closed, notify staff members, students and parents.

STAFF ACTIONS:

- θ Give **DROP, COVER and HOLD ON** command. Instruct students to move away from windows, bookshelves and heavy suspended light fixtures. Get under table or other sturdy furniture with back to windows.
 - θ Check for injuries, and render First Aid.
 - θ After shaking stops, **EVACUATE** building. Avoid evacuation routes with heavy architectural ornaments over the entrances. Do not return to the building. Bring attendance roster and emergency backpack.
 - θ Check attendance at the assembly area. Report any missing students to principal/site administrator.
 - θ Warn students to avoid touching electrical wires and keep a safe distance from any downed power lines.
 - θ Stay alert for aftershocks
-

- ∅ Do NOT re-enter building until it is determined to be safe.

Outside Building

STAFF ACTIONS:

- ∅ Move students away from buildings, trees, overhead wires, and poles. Get under table or other sturdy furniture with back to windows. If not near any furniture, drop to knees, clasp both hands behind neck, bury face in arms, make body as small as possible, close eyes, and cover ears with forearms. If notebooks or jackets are handy, hold over head for added protection. Maintain position until shaking stops.
- ∅ After shaking stops, check for injuries, and render first aid.
- ∅ Check attendance. Report any missing students to principal/site administrator.
- ∅ Stay alert for aftershocks.
- ∅ Keep a safe distance from any downed power lines
- ∅ Do NOT re-enter building until it is determined to be safe.
- ∅ Follow instructions of principal/site administrator.

During non-school hours

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- ∅ Inspect school buildings with Maintenance/Building and Grounds Manager to assess damage and determine corrective actions.
- ∅ Confer with District Superintendent if damage is apparent to determine the advisability of closing the school.
- ∅ Notify fire department and utility company of suspected breaks in utility lines or pipes.
- ∅ If school must be closed, notify staff members, students and parents. Arrange for alternative learning arrangement such as portable classrooms if damage is significant and school closing will be of some duration.
- ∅ Notify District Office, who will inform public information media as appropriate.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

EMERGENCY RESPONSE

EXPLOSION

Emergency response will depend on the type of explosion (smoke bomb, chemical lab incident, etc.) and proximity to the school. All students should be kept away from the explosion and under supervision.

PRINCIPAL/SITE ADMINISTRATOR:

- θ Determine whether site evacuation should be implemented. If so, sound fire alarm. This will automatically implement action to **EVACUATE** the building. **EVACUATION** may be warranted in some buildings but others may be used for **SHELTER IN PLACE**.
- θ Notify Fire Department (call 911). Provide school name, address, exact location within the building, your name and phone number and nature of the emergency.
- θ Secure area to prevent unauthorized access until the Fire Department arrives.
- θ Advise the District Superintendent of school status.
- θ Notify emergency response personnel of any missing students.
- θ Notify utility company of breaks or suspected breaks in utility lines or pipes. Provide school name, address, location within building, your name and phone.
- θ Direct a systematic, rapid and thorough approach to search the building and surrounding areas. Check classrooms and work areas, public areas (foyers, offices, bathrooms and stairwells), unlocked closets, exterior areas (shrubbery, trash cans, debris boxes) and power sources (computer rooms, gas valves, electric panels, telephone panels).
- θ Determine if Student Release should be implemented. If so, notify staff, students and parents.
- θ If damage requires the school to be closed, notify parents and staff of school status and alternate site for classroom instruction. Do not return to the school building until it has been inspected and determined safe by proper authorities.

STAFF ACTIONS:

- θ Initiate **DROP, COVER AND HOLD ON**.
 - θ If explosion occurred inside the school building, **EVACUATE** to outdoor assembly area. Keep students and staff at a safe distance from the building(s) and away from fire-fighting equipment.
 - θ Check to be sure all students have left the school site. Remain with students throughout evacuation process.
 - θ Upon arrival at assembly area, check attendance. Report status to site administrator immediately.
 - θ Render first aid as necessary.
 - θ Do not return to the building until the emergency response personnel determine it is safe to do so.
-

- θ If explosion occurred in the surrounding area, initiate **SHELTER IN PLACE**. Keep students at a safe distance from site of the explosion.

EMERGENCY RESPONSE **FIRE (offsite)**

A fire in an adjoining area, such as a wildland fire, can threaten the school building and endanger the students and staff. Response actions are determined by location and size of the fire, its proximity to the school and the likelihood that it may endanger the school community.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Determine if **EVACUATION** of school site is necessary.
- θ Contact local fire department (call 911) to determine the correct action for your school site.
- θ If necessary, begin evacuation of school site to previously identified safe site using school evacuation plan. If needed, contact bus dispatch for **OFF-SITE EVACUATION** and **DIRECTED TRANSPORTATION** by bus.
- θ Direct inspection of premises to assure that all students and personnel have left the building.
- θ Notify the school district where the school has relocated and post a notice on the office door stating the temporary new location.
- θ Monitor radio station for information.
- θ Do not return to the building until it has been inspected and determined safe by proper authorities.

STAFF ACTIONS:

- θ If students are to be evacuated, take attendance to be sure all students are present before leaving the building site.
- θ Stay calm. Maintain control of the students a safe distance from the fire and fire fighting equipment.
- θ Take attendance at the assembly area. Report any missing students to the principal/site administrator and emergency response personnel.
- θ Remain with students until the building has been inspected and it has been determined safe to return to.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

EMERGENCY RESPONSE

FIRE (onsite)

Should any fire endanger the students or staff, it is important to act quickly and decisively to prevent injuries and contain the spread of the fire. All doors leading to the fire should be closed. Do not re-enter the area for belongings. If the area is full of smoke, students and employees should be instructed to crawl along the floor, close to walls, which will make breathing easier and provide direction. Before opening any door, place a hand an inch from the door near the top to see if it is hot. Be prepared to close the door quickly at the first sign of fire. All fires, regardless of their size, which are extinguished by school personnel, require a call to the Fire Department to indicate that the “fire is out”.

Within School Building

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Sound the fire alarm to implement **EVACUATION** of the building.
- θ Immediately **EVACUATE** the school using the primary or alternate fire routes.
- θ Notify the Fire Department (call 911).
- θ Direct search and rescue team to be sure all students and personnel have left the building.
- θ Ensure that access roads are kept open for emergency vehicles.
- θ Notify District Office of situation.
- θ Notify appropriate utility company of suspected breaks in utility lines or pipes.
- θ If needed, notify bus dispatch for **OFF-SITE EVACUATION** by **DIRECTED TRANSPORTATION**.
- θ Do not allow staff and students to return to the building until the Fire Department declares that it is safe to do so.

STAFF ACTIONS:

- θ **EVACUATE** students from the building using primary or alternate fire routes. Take emergency backpack and student kits. Maintain control of the students a safe distance from the fire and fire fighting equipment.
- θ Take attendance. Report missing students to the Principal/designee and emergency response personnel.
- θ Maintain supervision of students until the Fire Department determines it is safe to return to the school building.

Near the School

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Notify the Fire Department (call 911). The Fire Marshall will direct operations once on site.
 - θ Determine the need to implement an **EVACUATION**. If the fire threatens the school, execute the actions above. If not, continue with school routine.
-

Flooding could threaten the safety of students and staff whenever storm water or other sources of water threaten to inundate school grounds or buildings. Flooding may occur if a water pipe breaks or prolonged rainfall causes urban streams to rise. Flooding may also occur as a result of damage to water distribution systems such as failure of a dam or levee. If weather-related, an alert message will be broadcast over the weather radio station.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Issue **STAND BY** instruction. Determine if evacuation is required.
- θ Notify local police department of intent to **EVACUATE**, the location of the safe evacuation site and the route to be taken to that site.
- θ Delegate a search team to assure that all students have been evacuated.
- θ Issue **DIRECTED TRANSPORTATION** instruction if students will be evacuated to a safer location by means of buses and cars.
- θ Post a notice on the office door stating where the school has relocated and inform the District Office.
- θ Monitor AM radio weather station _____ for flood information.
- θ Notify District Superintendent of school status and action taken.
- θ Do not allow staff and students to return to the building until proper authorities have determined that it is safe to do so.

STAFF ACTIONS:

- θ If warranted, **EVACUATE** students using evacuation plan. Take the class roster, emergency backpack and student comfort kits. Take attendance before leaving the campus.
- θ Remain with students throughout the evacuation process.
- θ Upon arrival at the safe site, take attendance. Report any missing students to principal/site administrator and emergency response personnel.
- θ Do not return to school building until it has been inspected and determined safe by property authorities.

BUS DRIVER ACTIONS:

- θ If evacuation is by bus, **DO NOT** drive through flooded streets and/or roads. **DO NOT** attempt to cross bridges, overpasses or tunnels that may be damaged by flooding.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____

EMERGENCY RESPONSE

GAS ODOR / LEAK

All school personnel, including cafeteria managers and custodians, shall immediately report any gas odor or suspected gas leak to the principal. If an odor is detected outside the building, it may not be necessary to evacuate.

STAFF ACTIONS:

- θ Notify principal.
- θ Move students from immediate vicinity of danger.
- θ Do not turn on any electrical devices such as lights, computers, fans, etc.
- θ If odor is severe, leave the area immediately.
- θ If the building is evacuated, take student attendance and report any missing students to Principal/Site Administrator.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ If gas leak is internal, evacuate the building immediately.
- θ Call 911.
- θ Notify utility company.
- θ Determine whether to move to alternate building location.
- θ If extended stay outdoors in inclement weather, contact transportation to provide bus to transport students to partner school or shelter students on buses.
- θ Do not return to the building until it has been inspected and determined safe by proper authorities.

ADDITIONAL STEPS FOR THE SCHOOL:

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EMERGENCY RESPONSE

HAZARDOUS MATERIALS

The nature of the material and the proximity of the incident to the school site will determine which emergency ACTION should be implemented. Police, Fire or Public Health Department may order **EVACUATION** of the school. See also **BIOLOGICAL AGENT RELEASE** and **CHEMICAL ACCIDENT**.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Call 911, if necessary.
- θ If there is a threat of airborne toxicity, shut-off ventilation system in affected area.
- θ Initiate **EVACUATION**. Any toxic cloud that can affect students in their classrooms would very likely affect them outside on the school grounds as well. If evacuating by foot, move crosswind to avoid fumes, never upwind or downwind.
- θ Isolate anyone suspected of being contaminated with a substance that could be transferred to others until public safety personnel carry out decontamination procedures.
- θ If time is available, initiate **DIRECTED TRANSPORTATION**. Move students and staff away from the path of the hazardous materials.
- θ Notify District Superintendent.
- θ Wait for instructions from emergency responders-- Health or Fire Department.
- θ Do not allow the return of students to the school grounds or buildings until public safety officials declare the area safe.
- θ Upon return to school, ensure that all classrooms are adequately aired.

TEACHER ACTIONS:

- θ Follow standard student assembly, accounting and reporting procedures.
- θ Report names of missing students to office.
- θ Do not take unsafe actions such as returning to the building before it has been declared safe.

ADDITIONAL STEPS FOR THE SCHOOL:

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EMERGENCY RESPONSE

HOSTAGE SITUATION

Hostage situations may unfold rapidly in a variety of ways. Events may range from a single perpetrator with a single hostage to several perpetrators with many hostages. Specific actions by school staff will be limited pending arrival of law enforcement officers. It is their responsibility to bring the situation to a successful conclusion. When as much of the school has been evacuated as can be accomplished, school staff should focus on providing support as needed to the police department, communicating with parents, and providing counseling for students.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS

- θ Call 911. Provide all known essential details of the situation:
 - Number of hostage takers and description
 - Type of weapons being used
 - Number and names of hostages
 - Any demands or instructions the hostage taker has given
 - Description of the area
- θ Identify an assembly area for responding officers away from the hostage situation. Have school liaison wait at assembly area for police to arrive.
- θ Protect building occupants before help arrives by initiating a **LOCKDOWN** or **EVACUATION** (or combination of both) for all or parts of the building.
- θ Secure exterior doors from outside access.
- θ When police arrive, assist them in a quiet, orderly evacuation away from the hostage situation.
- θ Gather information on students and/or staff involved and provide the information to the police. If the parent of a student is involved, gather information about the child.
- θ Identify media staging area, if appropriate. Implement a hotline for parents.
- θ Account for students as they are evacuated.
- θ Provide recovery counseling for students and staff.

STAFF ACTIONS:

- θ If possible, assist in evacuating students to a safe area away from the danger. Protect students by implementing a **LOCKDOWN**.
- θ Alert the principal/site administrator.
- θ Account for all students.

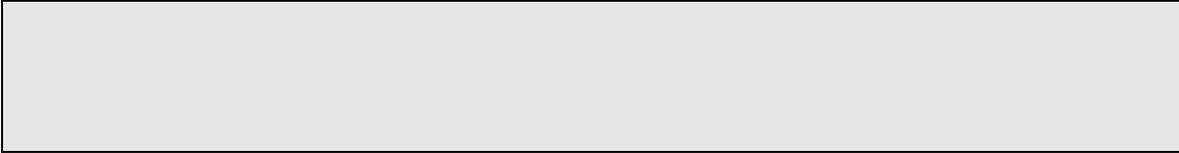
ADDITIONAL STEPS FOR THE SCHOOL:

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EMERGENCY RESPONSE

INTRUDER

All public schools are required to post signs at points of entry to their campuses or buildings from streets and parking lots. The following statement should be used on signage:



To prevent intruders on campus, keep doors secure, use sign-in sheets for visitors and cameras and staff to monitor entryways.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Initiate **LOCKDOWN**.
- θ Request intruder to leave campus. Remain calm. Be courteous and confident. Keep distance from the intruder. Speak in soft, non-threatening manner. Avoid hostile-type actions, except in cases when necessary to safeguard person or property. Listen to the intruder. Give him or her an opportunity to vent. Attempt to be helpful. When talking to the intruder, use phrases such as:
 - “What can we do to make this better?”*
 - “I understand the problem, and I am concerned.”*
 - “We need to work together on this problem.”*
- θ As soon as the conversation or actions of the individual become threatening or violent, call 911 immediately. Provide description and location of intruder.
- θ Keep subject in view until police or law enforcement arrives.
- θ Take measures to keep subject away from students and building.
- θ Designate an administrator or staff member to coordinate with public safety at their command post; provide a site map and keys to public safety personnel.
- θ When scheduling a meeting with an individual known to be aggressive, arrange for another staff member or student resource officer to be present.
- θ Be available to deal with the media and bystanders and keep site clear of visitors.

STAFF ACTIONS:

- θ Notify the principal/site administrator. Provide description and location of the intruder. Visually inspect the intruder for indications of a weapon.
- θ Keep intruder in view until police or law enforcement arrives. Stay calm. Do not indicate any threat to the intruder.
- θ Isolate intruder from students. Lock classroom and office doors. Close blinds and stay clear of windows and panes of glass. Remain inside rooms until the **ALL CLEAR** instruction is announced.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
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EMERGENCY RESPONSE

IRRATIONAL BEHAVIOR

A risk to the life and safety of students and staff may exist there is a serious display of disordered thought or behavior. Possible symptoms include: hallucinations, extreme paranoia, impaired judgment that may lead to unsafe decision-making and dangerous behavior (to self or others), incoherent or disjointed speech and self injurious behavior such as: hitting head, cutting self. Attempts should be made to use de-escalation strategies, calming techniques (e.g., deep breathing), and to implement behavior plans, crisis plans or strategies in IEP, if in place.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Keep the individual under continuous adult supervision.
- θ Keep the individual on campus until parent/guardian has been notified.
- θ Arrange appropriate support services for necessary care of individual.
- θ If the individual actively displays dangerous behavior or there is reason to believe the student cannot be safely transported, call agencies as appropriate to coordinate emergency mental health services (e.g., mental health facilities, juvenile court, law enforcement).
- θ School professional (psychologist, counselor, social worker, nurse) should recommend next steps to the principal. The next steps may include:
 - Provide parents/guardian with the names and phone numbers of mental health resources
 - Recommend that the parents make an immediate contact with a therapist.
 - Request that parents/guardian to sign release forms to allow two-way communication between the school and the treating agency.
- θ Make a follow-up check with the treating agency, family and student as appropriate, to ensure that appropriate care has been arranged.
- θ Provide follow-up collaborative support for the student and parents (as indicated) within the school
- θ Develop a safety plan prior to the student's return to school.
- θ Document actions taken on behalf of the student (referrals, phone contacts, follow-up activities, etc.)

STAFF ACTIONS:

- θ Take immediate action to isolate the individual and provide safety to the student body. Do not leave the irrational individual alone.
- θ Notify principal/site administrator.
- θ Notify school nurse, school psychologist, counselor or social worker.
- θ Protect individual from injury.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
 - _____
-

EMERGENCY RESPONSE

KIDNAPPING

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Verify information with the source of the abduction report.
- θ Contact law enforcement (call 911) for assistance.
- θ Provide a picture and complete information on the student: name, age, description, home address, emergency contact information, and custody information if known (Emergency Protective Order, Domestic Violence Order).
- θ Provide suspect information to the police, if known.
- θ Contact the parents/guardian of the student involved and establish a communication plan with them.
- θ Obtain the best possible witness information.
- θ Conduct a thorough search of the school/campus/bus.
- θ Relay current information to police, parents and essential school staff.
- θ Designate a staff member as a key contact and personally answer the phone line (no voice mail) to receive and provide updated status as it becomes available.
- θ Advise the law enforcement dispatcher of the staff member key contact's name and number.
- θ Provide the key contact with access to school records.
- θ Ask key contact to be available at school by phone beyond the close of the school day, if needed, until dismissed by the principal or law enforcement.
- θ When the child is found, contact all appropriate parties as soon as possible.

STAFF ACTIONS:

- θ Notify principal, providing essential details:
 - Name and description of the student
 - Description of the suspect
 - Vehicle information
- θ Move students away from the area of abduction.

ADDITIONAL STEPS FOR THE SCHOOL:

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- _____
- _____
- _____

EMERGENCY RESPONSE

MEDICAL EMERGENCY

Medical accidents and emergencies can occur at any time and may involve a student or staff member. Some emergencies may only need first aid care, while others may require immediate medical attention. This is not a First Aid manual. When in doubt, dial 911. Medical emergencies involving any student or employee must be reported to the Principal/Site Administrator.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Assess the victim (ABC – Airway, Breathing, Circulation. Call 911, if appropriate. Provide:
 - School name, address including nearest cross street(s) and fastest way for ambulance to reach the building
 - Exact location within the building
 - Nature of the emergency and how it occurred
 - Approximate age of injured person
 - Caller's name and phone number
- Do not hang up until advised to do so by dispatcher.
- θ Assign staff member to meet rescue service and show medical responder where the injured person is.
 - θ Assemble emergency care and contact information of victim
 - θ Monitor medical status of victim, even if he or she is transported to the hospital.
 - θ Assign a staff member to remain with individual, even if he or she is transported to the hospital.
 - θ Notify parents/guardian if the victim is a student. Describe type of illness or injury, medical care being administered, and location where student has been transported.
 - θ Advise staff of situation (when appropriate). Follow-up with parents.

Universal Precautions when Treating a Medical Emergency

- Always use non-latex or nitrile gloves and, if necessary, mask and gown, to reduce the risk of transmission of body fluids.
- Wash hands thoroughly after providing care.

STAFF ACTIONS:

- θ Assess the scene to determine what assistance is needed. Direct students away from the scene of the emergency.
- θ Notify Principal/Site Administrator.
- θ Stay calm. Keep individual warm with a coat or blanket.
- θ Ask school nurse to begin first aid until paramedics arrive. Do not move the individual unless there is danger of further injury.
- θ Do not give the individual anything to eat or drink.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____

EMERGENCY RESPONSE

MISSING STUDENT

If a student is missing, a search of the school should be organized immediately. If at any point the child is found, inform everyone who was notified of the incident that the student is no longer missing.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Call 911 and explain the situation.
 - θ Appoint staff to surveillance points; ask staff to note license plate numbers and look for any unusual activity.
 - θ Conduct an immediate search of the school campus/bus, as appropriate.
 - θ Gather information about student to provide to law enforcement authorities:
 - photo
 - home address
 - parent contact numbers
 - class schedule
 - special activities
 - bus route /walking information
 - θ Notify parents/guardians if the student is not found promptly.
 - θ If case involves abduction, begin gathering witness information for the police. Interview friends, last person to see student.
 - θ Double-check circumstances:
 - Did someone pick up the student?
 - Could the student have walked home?
 - Is he or she at a medical appointment or another activity?
 - θ Assist police with investigation. Provide a photo and complete information on the missing child: name. Assure that all parties who know the student or have participated in the search are available to speak with police when they arrive.
 - θ Designate a staff member as a key contact and personally answer the phone line (no voice mail) to receive and provide updated status as it becomes available.
 - θ Advise law enforcement dispatcher of the staff member key contact's name and number.
 - θ If missing during bus transportation, provide law enforcement with child's bus stop location and nearest other bus stops.
 - θ Have driver keep in communication with the transportation dispatcher. Have transportation dispatcher coordinate efforts and information with the law enforcement dispatcher
 - θ Exchange phone numbers (household, cell phone, school key contact) with parents/guardian.
 - θ When the child is found, contact all appropriate parties as soon as possible.
-

θ Arrange for counseling of students, as needed.

STAFF ACTIONS:

θ Confirm that student attended school that day. Notify Principal.

θ Provide description of the student, including height, weight, clothing worn that day, backpack, where last seen and when.

θ Bring all students indoors. Immediately lock exterior access to the school and secure the campus. Do not let any individuals leave. Do not let unauthorized individuals come onsite.

θ Take attendance in the classroom and report any other missing students to the office. Keep students in secure areas until notified to resume regular school activities.

ADDITIONAL STEPS FOR THE SCHOOL:

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- _____
- _____

EMERGENCY RESPONSE

MOTOR VEHICLE CRASH

A motor vehicle crash may result in a fuel or chemical spill on school property. If the crash results in a utility interruption, refer to the section on Utility Failure.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Notify police and fire department (call 911).
- θ Determine immediate response procedures, which may include **EVACUATION, OFF-SITE EVACUATION** or **DIRECTED TRANSPORTATION**.
- θ Arrange for first aid treatment and removal of injured occupants from building.
- θ Secure area to prevent unauthorized access until the public safety officials (police, sheriff, fire department) arrive.
- θ Ensure that students and staff remain at a safe distance from the crash.
- θ Account for all building occupants and determine extent of injuries.
- θ Notify District Superintendent.

STAFF ACTIONS:

- θ Notify Principal.
- θ Move students away from immediate vicinity of the crash.
- θ **EVACUATE** students to a safe assembly area away from the crash scene. Take class roster/nametags and emergency backpack.
- θ Check school site to assure that all students have evacuated.
- θ Take attendance at the assembly area.
- θ Report missing students to the principal /designee and emergency response personnel.
- θ Maintain control of the students a safe distance from the crash site.
- θ Care for the injured, if any.
- θ Escort students back to the to the school site when emergency response officials have determined it is safe to return to the building.

ADDITIONAL STEPS FOR THE SCHOOL:

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- _____
- _____

EMERGENCY RESPONSE

PANDEMIC INFLUENZA

Influenza is a highly contagious viral disease. Pandemic influenza differs from both seasonal influenza (flu) and avian influenza in the following aspects:

- It is a rare global outbreak which can affect populations around the world.
- It is caused by a new influenza virus to which people do not have immunity.
- Depending upon the specific virus, it can cause more severe illness than regular flu and can affect young healthy people more so than older, sick people.

The Department of Health and Human Services will take the lead in mobilizing a local response to pandemic influenza. Public health alerts will be reported to schools and the community. Individual schools may be closed temporarily to contain spread of the virus.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Activate heightened surveillance of illness within school site. Gather data on symptoms of students and staff who are sick at home.
- θ Insure that students and staff members who are ill stay home.
- θ Send sick students and staff home from school immediately.
- θ Provide fact sheets and guidelines for school families to make them aware of symptoms and remind them of respiratory hygiene etiquette
- θ Monitor bulletins and alerts from the Department of Health and Human Services.
- θ Keep staff informed of developing issues.
- θ Assist the Department of Health and Human Services in monitoring outbreaks.
- θ Respond to media inquiries regarding school attendance status.
- θ Implement online education, if necessary, so that students can stay home.
- θ Maintain surveillance after the initial epidemic in the event a second wave passes through the community.

STAFF and STUDENT ACTIONS:

- θ Stay home when ill with cough or other flu-like symptoms (chills, fever, muscle aches, sore throat).
- θ Practice “respiratory hygiene etiquette”.
- θ Disinfect surfaces contaminated with infected respiratory secretions with a diluted bleach solution (1 part bleach to 100 parts water).
- θ Implement online homework assignments so that students can stay home.

Respiratory Hygiene Etiquette

- Cover your cough and sneeze with a tissue
- Wash hands with soap and water or a waterless hand hygiene product
- Place used tissues into a sealed bag

ADDITIONAL STEPS FOR THE SCHOOL:

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EMERGENCY RESPONSE POISONING/CONTAMINATION

This procedure applies if there is evidence of tampering with food packaging, observation of suspicious individuals in proximity to food or water supplies or suspicion of possible food/water contamination. Indicators of contamination may include unusual odor, color and/or taste or multiple individuals with unexplained nausea, vomiting or other illnesses.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Call 911.
- θ Isolate suspected contaminated food/water to prevent consumption. Restrict access to the area.
- θ Maintain a log of affected students and staff and their systems, the food/water suspected to be contaminated, the quantity and character of products consumed and other pertinent information.
- θ Provide list of potentially affected students and staff to responding authorities.
- θ Provide staff with information on possible poisonous materials in the building.
- θ Notify District Superintendent of situation and number of students and staff affected.
- θ Confer with Department of Health and Human Services before the resumption of normal school activities.
- θ Prepare communication for families advising them of situation and actions taken.

STAFF ACTIONS:

- θ Notify principal/site administrator.
- θ Call the Poison Center Hotline 1-800-222-1222.
- θ Administer first aid as directed by poison information center.
- θ Seek additional medical attention as needed.

PREVENTATIVE MEASURES:

- θ Keep poisonous materials in a locked and secure location.
- θ Post the Poison Control Center emergency number in the front office, school clinic and on all phones that can call outside.
- θ Post the names of building personnel who have special paramedic, first aid training or other special lifesaving or life-sustaining training.

ADDITIONAL STEPS FOR THE SCHOOL:

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EMERGENCY RESPONSE

PUBLIC DEMONSTRATION

When an advance notice of a planned protest is given, inform the staff of the planned demonstration. An information letter to parents should be developed.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Obtain information on when, why and how many people are expected. Identify the spokesperson for the group
- θ Contact local police department for the school's jurisdiction and advise them of the situation.
- θ Notify staff of the planned demonstration.
- θ Develop an information letter to parents.
- θ Assign a staff member to act as liaison with police, media and, possibly the demonstrating group.
- θ Designate a staff member to handle incoming calls during the demonstration.
- θ Establish areas where demonstrators can set up without affecting the operation of the school
- θ Notify transportation of demonstration and any possible impact buses may encounter arriving at or departing from the school.

STAFF ACTIONS:

- θ Do not allow students to be interviewed by the media or join in the demonstration

ADDITIONAL STEPS FOR THE SCHOOL:

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- _____
- _____

EMERGENCY RESPONSE

SEXUAL ASSAULT

Sexual assault and abuse is any type of sexual activity that a person does not agree to, including:

- inappropriate touching
- vaginal, anal, or oral penetration
- sexual intercourse that is not wanted
- rape
- attempted rape
- child molestation

Sexual assault can be verbal, visual, or anything that forces a person to join in unwanted sexual contact or attention. It can occur by a stranger in an isolated place, on a date, or in the home by someone who is a friend or acquaintance. Depending on the situation, the victim should not eat or drink, change clothes or shower while awaiting police.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Call 911 if the assault is physical.
- θ Close off the area to everyone.
- θ Assign a counselor/staff member to remain with the victim.
- θ Review possible need for a **LOCKDOWN** until circumstances surrounding the incident are known.
- θ Notify victim's family.
- θ If child abuse is suspected, notify law enforcement. Notify student services staff members, as appropriate.
- θ The police will coordinate collection of evidence and questioning of the victim and suspects. Cooperate with any law enforcement agency conducting investigations.
- θ Discuss with counselors how to handle emotional effects of the incident on student and staff population. Plan appropriate school events for next day.
- θ Coordinate statements to media, families and community. Be aware of rumors that may start from this type of incident and address those rumors directly using facts.

STAFF ACTIONS:

- θ Determine if immediate medical attention is needed. If so, call 911.
- θ Isolate the victim from activity related to the incident.
- θ Avoid asking any questions except to obtain a description of the perpetrator.

ADDITIONAL STEPS FOR THE SCHOOL:

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Immediate response to a rapidly changing incident is critical. In most cases, initiate **LOCKDOWN** procedures to isolate students from danger or send them to a secure area. Safety must always be the foremost consideration.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Remain calm. Do not confront the shooter(s).
 - θ Assess the situation:
 - Is the shooter in the school?
 - Has shooter been identified?
 - Has the weapon been found and/or secured?
 - θ Depending on the situation, initiate **LOCKDOWN** or **EVACUATION**, as appropriate.
 - θ Call 911. Provide essential details of the situation, i.e., suspect, location, weapons, number of persons involved, motive, injuries/casualties, actions taken by the school (e.g. **LOCKDOWN**).
 - θ Identify command post for police to respond. Assist police in entering the school; provide officers with critical information.
 - θ Ensure injured students and staff receive medical attention.
 - θ If shooter has left, secure all exterior doors to prevent re-entry.
 - θ If a firearm is known to exist, do not touch it. Allow a law enforcement officer to take possession of the weapon.
 - θ Keep crime scene secure. Organize **OFF-SITE EVACUATION**, if necessary, or prepare to continue with classes.
 - θ Isolate and separate witnesses.
 - θ Gather information for police about the incident and everyone involved with it:
 - Name of suspect(s)
 - Location of shooting
 - Number and identification of casualties and injured
 - Current location of the shooter(s)
 - θ Prepare written statements for telephone callers and media. Refer media inquiries to designated Public Information Officer.
 - θ Prepare letter for students to take home to their families.
 - θ Arrange for immediate crisis counseling for students and staff.
 - θ Provide liaison for family members of injured students and staff members.
 - θ Debrief staff and school police officers.
 - θ Provide informational updates to staff, students and their families during the following few days.
-

STAFF ACTIONS:

- θ Remain calm.
- θ Alert the principal/site administrator.
- θ Take immediate action to prevent casualties. Isolate the suspect and/or area. Move others to a safe area to protect them from danger. Institute **LOCKDOWN** or **EVACUATION**, as appropriate.
- θ Provide first aid for victims, if needed.
- θ Account for all students. Maintain order in assembly area or shelter and await arrival of law enforcement.
- θ Assist police officers – provide identity, location and description of individual and weapons.

ADDITIONAL STEPS FOR THE SCHOOL:

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- _____
- _____
- _____

EMERGENCY RESPONSE STORM / SEVERE WEATHER

Severe weather can be accompanied by high winds, downed trees, and swollen creeks. An emergency response is required when this type of weather poses any risk to the staff and students. Assure that each student's method of returning home is safe and reliable.

Severe Storm

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Monitor weather forecasts and weather-related communications to determine onset of storm conditions that may affect school operations.
- θ Report to site by 6 a.m. to check for power outages, flooding, etc.
- θ Determine whether school will be closed or remain open.
- θ Notify superintendent of school status.
- θ Assign staff to activate staff and parent phone trees
- θ Post school status on school website.
- θ Notify utility companies of any break or suspected break in utility lines.
- θ Take appropriate action to safeguard school property.
- θ Upon passage of the storm, return to normal routine.

Windstorm

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Monitor weather forecasts to determine onset of storm conditions that may affect school operations
- θ Notify utility companies of any break or suspected break in utility lines.
- θ Keep staff and students in sheltered areas of the building until winds have subsided and it is safe to return to the classroom.
- θ Take appropriate action to safeguard school property.
- θ Upon passage of the storm, return to normal routine.

STAFF ACTIONS:

- θ Evacuate any classrooms bearing full force of wind. Evacuate to lower floor of school building near inside walls.
 - θ Initiate **TAKE COVER** with students in the shielded areas within the building. Stay away from windows.
 - θ Take attendance. Report any missing students to principal/site administrator.
 - θ Close all blinds and curtains.
 - θ Avoid auditoriums, gymnasiums and other structures with large roof spans.
-

- θ Remain with students near an inside wall or on lower floors of the building. Make arrangements for special needs, snacks and quiet recreational activities.

EMERGENCY RESPONSE

STUDENT RIOT

A student riot is an assemblage of students whose purpose and conduct threatens the safety and security of the school community and school property. Students who participate in a riot on campus should be informed that they will be suspended or possibly arrested if they do not comply with instructions. Providing a timely opportunity for students to vent, in a safe and constructive atmosphere, should prevent the escalation of violence.

STUDENT ACTIONS:

- θ In a violent situation, immediately notify the first available adult.
- θ Do not retaliate or take unnecessary chances.
- θ Move away from the area of agitation.
- θ Hold on to belongings to the extent that it is safe to do so; do not pick up anything and do not go back for anything until receiving clearance to do so.
- θ Stay calm and reassure fellow students.
- θ Assist teachers and staff in accounting for students.
- θ Share all relevant information with law enforcement, teachers, and school staff.
- θ Follow directions from school administrator or law enforcement directions about where to go.
- θ Do not speculate to others or perpetuate rumors.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Initiate **LOCKDOWN**, if warranted. Alert other administrators about the incident.
 - θ Control student ingress and egress from campus.
 - θ Identify why the disruption is occurring. If necessary, notify police to request assistance.
 - θ If disruption is non-violent, notify school resource officer or school education officer.
 - θ Clearly communicate to all students (via announcement or bullhorn), in the presence of staff or adult witnesses, that students should either attend classes or move to a designated safe area. Inform students that they will be suspended or possibly arrested if they do not comply with instructions.
 - θ Assign staff member to be responsible for media relations and for setting up a staging area for the media.
-

- θ If student disruption persists, after a second warning, take appropriate disciplinary action as outlined by the Student Responsibilities and Rights Handbook.
 - θ Notify parents about the incident, as appropriate.
 - θ After insuring physical safety of those involved, provide crisis intervention or counseling to meet psychological needs of students and staff.
-

EMERGENCY RESPONSE

SUICIDE ATTEMPT

Suicide, attempted suicide, and suicidal gestures have a significant detrimental effect, not only on the involved student, but also on others in the school community. There is no way to predict who will commit suicide, or when, but there are warning signs, including: increasing talk of death, talk about not being worth living and reckless behavior. School staff with reasonable cause to believe that a student is suicidal should begin the intervention process immediately. Parents must always be contacted. Attention should focus on the safety and best interests of the student, whose health, life or safety may be endangered

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Call ambulance in event of overdose or injury requiring medical attention.
- θ Call 911 if immediate threat exists to the safety of the student or others.
- θ Calm student by talking and reassuring until police arrive. Try to have the student relinquish devices for and means of harming self. If individual is armed with any type of weapon, USE EXTREME CAUTION. Do not attempt to remove the weapon from the possession of the individual. Allow police to do so.
- θ Cancel all outside activities.
- θ Determine if the student's distress appears to be the result of parent or caretaker abuse, neglect, or exploitation. If not, contact parents/guardians and encourage them to have the child evaluated. Provide a list of referral sources and telephone numbers.
- θ If allegations warrant, refer student to Child Protective Services. Contact parents/guardians and inform them of actions taken.
- θ Arrange for medical or counseling resources that may provide assistance.

STAFF ACTIONS:

- θ Inform the Principal of what was written, drawn, spoken and/or threatened.
- θ Move other students away from the immediate area, but remain with the troubled student until assistance arrives.
- θ Calmly talk to the student to determine whether he/she has any life-threatening devices (e.g., gun, knife, drugs, etc.) If possible, calmly remove them from the student and the immediate environment. Do NOT struggle if you meet resistance.
- θ Calmly move the student to a pre-arranged, non-threatening place away from other students where a Crisis Intervention Team member and a telephone will be close by.



ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____

EMERGENCY RESPONSE

SUSPICIOUS PACKAGE

The following list shows some types of parcels that should draw immediate concern:

- Foreign mail, air mail and special delivery
- Restrictive markings, e.g., "Personal"
- Handwritten or poorly-typed addresses
- Titles but no names
- Misspelling of common names
- Excessive weight, unevenly distributed
- No return address
- Excessive postage
- Excessive masking tape, string
- Oily stains or discoloration
- Protruding wires or tin foil
- Rigid envelope

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Call 911.
- θ Make a list of all persons who came into contact with the package. Include work and home phone numbers for any necessary follow-up.
- θ Prevent others from coming into the area.
- θ Ask everyone who has been in contact with the package to remain until instructed to leave by Public Safety or Public Health responders.
- θ If powder spills out, shut the ventilation system, heating system, or air
- θ Public health and safety staff will determine the need for decontamination and initiation of prophylaxis treatment.
- θ Advise staff when the emergency is over. Go home, take a shower and wash clothes. Do not use bleach on your skin.

STAFF ACTIONS if package is unopened and not leaking:

- θ Do not open package. Do not pass it around to show it to other people.
- θ Do not bend, squeeze, shake or drop package.
- θ Put package in a container such as a trash can to prevent leakage. Move it a safe distance from other people.
- θ Leave the room promptly and prevent anyone from entering.
- θ Notify principal or Site Administrator.

STAFF ACTIONS if package is leaking:

- θ Do not sniff, touch, taste, or look closely at the spilled contents.
 - θ Do *not* clean up the powder.
 - θ Put the package on a stable surface.
 - θ Leave the room promptly and prevent anyone from entering.
 - θ Wash hands thoroughly with soap and water.
 - θ Notify principal or Site Administrator.
-

ADDITIONAL STEPS FOR THE SCHOOL:

-

EMERGENCY RESPONSE TERRORIST ATTACK / WAR

Thorough crisis planning will carry the school and district a long way in responding to a terrorist incident during school hours. A terrorist attack may result in the following:

- Damage beyond school boundaries;
- Victims who are contaminated or seriously injured;
- Widespread fear and panic;
- A crime scene to protect.

Civil Defense Warning of Possible Enemy Attack

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Move students to closest suitable shelter.
- θ If the above is not advisable, remain in school building as place of shelter.

STAFF ACTIONS:

- θ Keep students calm.
- θ Close all curtains and blinds.

Enemy Attack Without Warning

STAFF ACTIONS:

- θ Keep students calm.
- θ Close all curtains and blinds.
- θ Instruct students to DUCK AND COVER.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

EMERGENCY RESPONSE

THREAT LEVEL RED

These are actions to take when the Homeland Security Advisory System risk is set at "Threat Level Red", specific to the community.

During school hours

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Listen to radio and TV for current information and instructions.
- θ Initiate **ACTION** appropriate for the situation. Action may likely involve **DUCK, COVER and HOLD, EVACUATION, SHELTER IN PLACE or TAKE COVER.**
- θ Continue to monitor media for specific situation.
- θ Be alert and immediately report suspicious activity to proper authorities.
- θ If circumstances and time allow, move students to closest suitable shelter.
Location: _____
Procedure for movement to shelter: _____
- θ If moving students is not advisable, remain in building as place of shelter.
- θ Close school if recommended to do so by appropriate authorities.

OFFICE STAFF ACTIONS:

- θ Require identification check for anyone entering school other than students, staff and faculty.
- θ Escort visitors to location in school building.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

EMERGENCY RESPONSE

THREATS / ASSAULTS

Threats occur when a belligerent or armed person on the school site bullies, intimidates or coerces others, targeting an individual, particular group or the entire school community. Threats are presented as overt hostility. They may be received by written note, email communication, phone call or orally. The procedure below applies to an oral threat.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- ∅ Assess the type of threat to determine the level of risk to the safety of students and staff. In categorizing the risk, attempt to determine:
 - 1) Is the individual moving towards violent action?
 - 2) Is there evidence to suggest movement from thought to action?
 - High violence potential qualifies for arrest or hospitalization.
 - Safety is endangered when there is: (a) sufficient evidence of repetitive/intentional infliction of emotional distress upon others; or (b) sufficient evidence of the unintentional infliction of emotional distress upon others.
- ∅ Notify police (dial 911), if the safety of students or staff is endangered. Provide exact location and nature of incident and school response actions.
- ∅ Isolate the threatening person from other students and staff, if it is safe to do so. Initiate appropriate response actions, which may be **LOCKDOWN** or **EVACUATION**. Cancel all outside activities.
- ∅ Respond to students who are prone to overt displays of anger in a calm, non-confrontational manner. If an immediate threat is not clearly evident, attempt to diffuse the situation.
- ∅ If an individual is armed with any type of weapon, **USE EXTREME CAUTION**. Do not attempt to remove the weapon from the possession of the individual. Allow police to do so.
- ∅ Facilitate a meeting with student(s) and family to review expectations.
- ∅ Facilitate a staff meeting to review plans for keeping school safe. Enlist the support of community service providers.

STAFF ACTIONS:

- ∅ If any students are outside, move them inside the building or away from the site of the threat/assault. If unable to do so, have students lie down and cover their heads. Keep students calm.
- ∅ Inside the classroom, institute **LOCKDOWN**. Close all curtains and blinds.
- ∅ Disconnect the school television system in classrooms so the individual cannot view news coverage and see locations of police/students/etc.
- ∅ Remain with students until **ALL CLEAR** is given.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
 - _____
-

Generated by earthquakes, underwater disturbance or volcanic eruption, a tsunami is a series of waves that come onshore as a rapidly rising surge of water. Tsunami waves can travel at speeds up to 600 miles per hour in the open ocean. Areas at greatest risk of inundation are less than 25 feet above sea level and within one mile of the coastline.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**Before**

- θ Know the height of the school above sea level and its distance from the shoreline. Evacuation orders may be based on these numbers.
- θ Be familiar with tsunami warning signs. An earthquake or a sizable ground rumbling is a warning signal to people living near the coast. A noticeable rapid rise or fall in coastal waters may indicate an approaching tsunami.
- θ Make plans for evacuation by vehicle and/or by foot. Pick an inland location that is elevated. Identify an alternative evacuation site in case roads are blocked.

During

- θ Heed natural warnings. An earthquake or rapid fall in coastal waters may serve as a warning that a tsunami is coming
- θ Monitor the NOAA Weather Radio Service for tsunami warnings: <http://wcatwc.arh.noaa.gov/>. Authorities will issue a warning and tone alert only if they believe there is a potential threat of a tsunami.
- θ Quickly move students and staff to higher ground as far inland as possible. Follow instructions issued by local authorities. Planned evacuation routes may be blocked; bridges may be damaged. Every foot inland or upwards may make a difference.
- θ Notify superintendent of school status.
- θ Remain on safe ground until local authorities advise it is safe to return.

After

- θ Stay tuned to the National Weather Service for the latest emergency information. The tsunami may have damaged roads, bridges, and other structures that may be unsafe.
 - θ Expect debris.
 - θ Stay out of damaged buildings and those surrounded by water. Tsunami water can undermine foundations and cause walls and floors to collapse.
 - θ Determine whether school will be closed or remain open.
 - θ Notify superintendent of school status.
 - θ Assign staff to activate staff and parent phone trees
 - θ Post school status on school website.
-

- θ Arrange with authorities to check for broken or leaking gas lines, flooded electrical circuits, furnaces or electrical appliances. Flammable or explosive materials may come from upstream.
- θ Check food supplies and test drinking water. Discard food that has come in contact with flood waters. It may be contaminated and should be thrown out. Use tap water only if local health officials advise it is safe.
- θ Photograph the damage, both of the building and its contents, for insurance claims.

STAFF ACTIONS:

- θ If there is a coastal earthquake, initiate **TAKE COVER** with students in the shielded areas within the building. Stay away from windows.
- θ When the shaking stops, quickly move students and staff to higher ground, at least 100 feet above sea level and two miles inland. Buildings located in low-lying coastal areas are not safe. Do NOT stay in such buildings if there is a tsunami warning. Be careful to avoid downed power lines.
- θ Take attendance. Report any missing students to principal/site administrator.
- θ Keep students and staff away from the beach. Watching a tsunami from the beach or cliffs could put them in grave danger. A second wave may be more destructive than the initial one. A tsunami can move faster than a person can escape it.
- θ Return to school only if authorities advise it is safe to do so.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

EMERGENCY RESPONSE

UTILITY FAILURE

Failure of any of the utilities (electricity, gas, water) during school hours constitutes a condition that must be dealt with on a situational basis. Advance notice may be received from a utility company regarding loss of service. In many cases, such loss of service will be of short duration and require no special action other than notifying staff of the temporary interruption of service.

PRINCIPAL/SITE ADMINISTRATOR:

- θ Notify utility company. Provide the following information:
 - Affected areas of the school site
 - Type of problem or outage
 - Expected duration of the outage, if known
- θ Determine length of time service will be interrupted.
- θ Determine desired action, which may include relocation of students and staff, notification of parents, and alternate food service.
- θ If disruption in service will severely hamper school operation, notify students and staff by appropriate means.
- θ Use messengers with oral or written word as an alternate means of faculty notification.
- θ Notify District Office of loss of service.
- θ Implement plan to provide services without utilities or with alternate utilities.

A. Plan for Loss of Water

Toilets: _____
Drinking Water: _____
Food Service: _____
Fire Suppression: _____
Other: _____

B. Plan for Loss of Electricity

Ventilation: _____
Emergency Light: _____
Computers: _____
Other: _____

C. Plan for Loss of Natural Gas

Heat: _____
Food Service: _____

Other: _____

EMERGENCY RESPONSE

WEAPON

The brandishing of any weapons poses an immediate threat to students and staff. Response is the same whether the weapon is used, seen or suspected but not in use. Safety must always be the foremost consideration. A person wielding a weapon will usually respond best to calm, reasonable talk. In addition to calming the individual, talking allows time for law enforcement officials and other professionals to arrive.

STAFF ACTIONS:

- θ Remain calm. Take immediate action to prevent casualties. Isolate the suspect and/or area. Move others to a safe area to protect them from danger.
- θ Alert the principal/site administrator.
- θ Make no effort to intervene. Allow a law enforcement officer to take possession of the weapon.
- θ Provide first aid for victims, if needed.
- θ Account for all students.
- θ Assist police officers – provide identity, location and description of individual and weapons.

PRINCIPAL/SITE ADMINISTRATOR ACTIONS:

- θ Remain calm. Depending on how the situation unfolds, initiate **LOCKDOWN** or **EVACUATION**, as needed. Do not confront the suspect.
 - θ Call 911. Provide essential details of the situation, i.e., suspect, location, weapons, number of persons involved, motive, actions taken by the school (e.g. **LOCKDOWN**).
 - θ Identify command post for police to respond. Assist police to enter the school. Provide officers with critical information. Accompany the police officer to the student suspected of having a weapon.
 - θ If suspect has left, secure all exterior doors to prevent re-entry.
 - θ Isolate and separate witnesses. Instruct them to write a statement of events while waiting for police to arrive.
 - θ Gather information about the incident for the police:
 - Name of student with weapon.
 - Location of witness when weapon was seen.
 - What did the student do with the weapon after it was displayed?
 - What is the current location of the student with the weapon?
 - θ Reserve a private area for the student to be taken and questioned. Allow police officer to thoroughly search student with another adult witness present. Police officer should take possession of and secure any weapon located.
-

- θ Assign an administrator to remove all of the suspected student's belongings (book bag, clothing, etc.) from the classroom. Do not allow the student to pick-up or carry his own belongings.
- θ Search student's belongings, including--but not limited to --backpack, purse, locker, and auto, if applicable.
- θ Notify parents/guardians.
- θ Follow procedures for student disciplinary actions. Take photo of weapon to be included in the expulsion proceedings.
- θ Secure a detailed written statement from witnesses including staff.
- θ Provide post-event trauma counseling for students and staff, as needed.
- θ Provide informational updates to staff, students and their families during next few days to squelch rumors.

ADDITIONAL STEPS FOR THE SCHOOL:

- _____
- _____
- _____
- _____

#

IV – RECOVERY

SECTION IV – RECOVERY ORGANIZATION

Act well at the moment, and you will have performed a good action for all eternity.

--John Caspar Lavater

Recovery refers to the follow-up measures taken after a disaster to return the affected site back to normal operating conditions. Recovery focuses on restoring the infrastructure of the school (utilities, phones, water) to service, re-establishing a sense of emotional safety and returning to the learning environment as quickly as possible after a crisis. Recovery actions are generally begun as response activities diminish, but some activities (e.g., keeping track of personnel time) must be started simultaneously with response. Recovery measures are designed to assist students and staff impacted by physical, psychological and emotional trauma following sudden tragic events. Students and their families, administrators, teachers and staff will benefit from recovery support at two levels: immediate and ongoing.

Immediate (short-term) support is needed from the first moments of a traumatic event through the first few days following it. Frequently, recent victims of the trauma are in a state of shock, and basic human needs of medical attention, shelter and food are the primary focus. Emergencies affecting a small number of people, or certain district-level emergencies, may be well served by crisis counseling and recovery assistance from other district employees, local community mental health providers, employee assistance programs and similar services.

Ongoing (long-term) recovery refers to support provided to some individuals for weeks, months, or years following a tragic event. Such long-term recovery needs may only become apparent over time.

A. RECOVERY ORGANIZATION

Recovery actions follow the same five SEMS/NIMS functions as Response, but during the Recovery phase, there will be more work for those performing in Administration/Finance and less for those in Operations. Below are typical recovery tasks by SEMS/NIMS function:

Management

- MAKE policy decisions, e.g., who coordinates returning staff.
- CONTINUE public information activities.
- MANAGE safety considerations, e.g., assure facility is safe for re-entry.
- RE-ESTABLISH a sense of safety.
- SUPPORT immediate emotional recovery—staff and students.

Operations

- COORDINATE damage assessment and debris removal.
 - RESTORE utilities.
 - ARRANGE for building and safety inspections prior to re-entry.
 - ARRANGE for repairs.
-

Planning/Intelligence

- DOCUMENT SEMS compliance for use in applying for disaster relief. See forms in **APPENDIX D** and refer to the Federal Emergency Management Agency website at FEMA.GOV and the California Office of Emergency Services at OES.CA.GOV.
- WRITE recovery after-action reports.
- DEVELOP a post-incident mitigation plan to reduce future hazards.

Logistics

- PROVIDE recovery-related supplies and replenish disaster cache at each site
- COORDINATE availability of personnel, equipment and vehicles needed for recovery efforts

Administration/Finance

- PREPARE and maintain budget.
- DEVELOP and maintain contracts.
- APPLY for financial relief grants.
- PROCESS staff injury claims.
- HANDLE insurance settlements.
- DOCUMENT employee time as Disaster Service Worker; assure continuity of payroll.

B. DOCUMENTING EMERGENCY OUTCOMES

Once the safety and status of staff and students have been assured, and emergency conditions have abated, assemble staff to support the restoration of the schools educational programs. Defining district mission-critical operations and staffing will be a starting point for the recovery process.

- CONDUCT a comprehensive assessment of the emergency's physical and operational effects. Assess physical security, data access, and all other critical services (e.g., plumbing, electrical).
 - PERFORM impact analysis. Examine critical information technology assets and personnel resources, and determine the impact on the school for each asset and resource that is unavailable.
 - DOCUMENT damaged facilities, lost equipment and resources, and special personnel expenses that will be required for Insurance and FEMA assistance claims.
 - PROVIDE detailed facilities data to the school district office so that it can estimate temporary space reallocation needs and strategies.
 - ADMINISTER Workers' Compensation that claims may arise if there are on-the-job injuries
 - ARRANGE for ongoing status reports during the emergency to: a) estimate when the educational program can be fully operational; and b) identify special facility, equipment, and personnel issues or resources that will speed resumption of classes.
 - APPRISE the Marin County Office of Education of recovery status.
-

The following items are district-level responsibilities. An individual school site might want to check with its district to determine the procedures that will be followed.

- IDENTIFY record keeping requirements and sources of financial aid for disaster relief.
- ESTABLISH absentee policies for teachers/students after a disaster.
- ESTABLISH an agreement with mental health organizations to provide counseling to students and their families after the disaster.
- DEVELOP alternative teaching methods for students unable to return immediately to classes: correspondence classes, videoconferencing, tele-group tutoring, etc.
- CREATE a plan for conducting classes when facilities are damaged, e.g., alternative sites, half-day sessions, portable classrooms.

C. GOVERNMENT ASSISTANCE AFTER A DISASTER

The following are recovery programs typically available after a disaster. Not all programs may be applicable to or activated in response to every disaster. In addition, other governmental actions (such as tax relief) and programs (e.g., job training services) may be implemented if disaster conditions warrant.

▪ **LOCAL EMERGENCY PROCLAMATION REQUIRED**

Governor's Office of Emergency Services California Disaster Assistance Act (CDAA) – The CDAA (Government Code § 8680-8692) authorizes the Director of the Governor's Office of Emergency Services to administer a financial assistance program from the state for costs incurred by local governments as a result of a disaster. This program offers public schools up to 75% of the eligible costs to repair, restore, reconstruct or replace disaster-related damage to buildings; covers direct and indirect costs of grant administration; and covers the cost of overtime and supplies used in response. The remaining 25% cost share is the responsibility of the local government.

▪ **GOVERNOR'S STATE OF EMERGENCY PROCLAMATION REQUIRED**

Governor's Office of Emergency Services California Disaster Assistance Act (CDAA) – With a Governor's Proclamation, a local agency may receive reimbursement (75%) for permanent repair, replacement, restoration costs for disaster-damaged facilities. The remaining 25% cost share is the responsibility of the local government.

The California Office of Emergency Services at ((916) 845-8100 or <http://www.oes.ca.gov> and FEMA at 800-621-FEMA or online at <http://www.fema.gov/assistance/register.shtm> should be contacted for appropriate updated forms to use for disaster recovery documentation and requests.

▪ **PRESIDENTIAL EMERGENCY DECLARATION REQUIRED**

Federal Emergency Management Agency Emergency Declaration – With an Emergency Declaration, a local agency, state agency, Indian Tribe or certain non-profit agencies may get reimbursement (75%) for emergency work up to a limit of \$5 million per event. Local agencies may also receive cost-sharing assistance under the provisions of the CDAA for the remaining 25% local share. CDAA

assistance is provided on a 75% (state) / 25% (local) cost-sharing basis, which yields a local cost share of 6.25%.

▪ **PRESIDENTIAL MAJOR DISASTER DECLARATION REQUIRED**

Robert T. Stafford Disaster Relief and Emergency Assistance Act (Public Law 93-288) – PL 93-288 and amendments make federal funds available to K-12 schools, colleges and universities when the President declares a major disaster. Under PL 93-288, the President is authorized to:

- Direct Federal agencies to provide assistance essential to meeting immediate threats to life and property resulting from a major disaster including search and rescue, emergency medical care, emergency mass care, debris removal, demolition of unsafe structures which endanger the public and provision of temporary facilities for schools;.
- Direct any Federal agency to provide resources (personnel, equipment, supplies, facilities, and managerial, technical, and advisory services) in support of state and local assistance efforts;
- Assist state and local governments in the distribution of medicine, food, and other consumable supplies, and emergency assistance;
- Contribute up to 75 percent of the cost of hazard mitigation measures which substantially reduce the risk of future damage, hardship, loss, or suffering in any area affected by a major disaster;
- Make grants to states, upon their request, for the development of plans and programs for disaster preparedness and prevention. Specific amounts and percentages vary with disaster and are negotiated between the federal and state governments at the time of the disaster.
- Provide temporary public transportation service in an area affected by a major disaster to meet emergency needs and to provide transportation to governmental offices, schools, major employment centers, and other places to enable the community to resume its activities as soon possible.
- Ensure that all appropriate Federal agencies are prepared to issue warnings of disasters to state and local officials.

PL 93-288 constitutes the statutory authority for most Federal disaster response activities especially as they pertain to the Federal Emergency Management Agency (FEMA). FEMA manages federal response and recovery efforts following any national incident. FEMA provides grants to states and local governments to implement long-term hazard mitigation measures after a major disaster declaration, provides assistance to alleviate suffering and hardship resulting from major disasters or emergencies declared by the President and works with state and local emergency. FEMA also initiates proactive mitigation activities, trains first responders, and manages the National Flood Insurance Program. FEMA became part of the U.S. Department of Homeland Security on March 1, 2003.

Note: For disaster assistance, private K-12 schools must first make a claim with their insurance provider, then apply to the Small Business Administration (SBA) for a Physical Disaster Loan (up to \$1.5 million), and then, if rejected by SBA or if there is damage above \$1.5 million, the school can apply to FEMA for additional assistance.

D. General Emergency Recovery Checklist

Recovery activities (such as the restoration of the physical spaces and psychological first aid) are of tremendous value in helping people come to terms with a crisis.

- ❑ DOCUMENT activities.
- ❑ ACKNOWLEDGE the event. The return to school will be one of coming together and identifying experiences and, possibly, losses
- ❑ IDENTIFY those affected. It may take time to understand the full impact on the school community.
- ❑ ASSESS students and staff directly for the emotional impact of the crisis. Student and staff reactions may be immediate or delayed.
- ❑ EMPHASIZE resiliency. Re-instituting control and predictability for the school community enhances equilibrium and coping skills. Routine is reassuring.
- ❑ RESTORE the physical facility.
- ❑ REQUEST assistance as needed from local public safety agencies and providers.
- ❑ IDENTIFY what follow up interventions are available to students and staff.
 - Conduct debriefings with staff; support their concerns and emotions.
 - Provide classroom assistance, if needed.
 - Outline schedule for the day; modify day's schedule if needed.
 - Identify resources available to teachers and students.
 - Provide access to these support resources.
- ❑ COORDINATE announcements, press releases and other communications to the school community, media and local community. Distribute information releases to all school staff.
- ❑ ESTABLISH contact with parents/family members of affected students to offer support, determine assistance needed, and acquire information regarding hospital visitation and/ or funeral arrangements.
- ❑ CONTROL rumors, provide regular updates of information to various groups.
- ❑ DEVELOP a long term recovery plan.
- ❑ CONSIDER curricular activities that address the crisis.
- ❑ ALLOCATE appropriate time for recovery.
- ❑ PREPARE a post-incident after action report that includes recommended improvements to emergency plans. CAPTURE "lessons learned" and incorporate them into revisions and trainings.
- ❑ PLAN how anniversaries of events will be commemorated.

E. Recovery Strategies for Emergencies/Critical Incidents

The following information may be useful in the days and weeks after an emergency.

THE DAY AFTER: WORKDAY TWO OF EMERGENCY MANAGEMENT

- Convene a District Crisis Response Team to assist with debriefing.
 - Assess system-wide support needs, and develop planned intervention strategies;
 - Schedule and provide student, family and staff Critical Incident Stress Management services;
 - Discuss successes and problems;
 - Discuss things to do differently next time.
- Convene the staff to provide updates on additional information and procedures.
- Identify students and staff in need of follow-up support and assign staff members to monitor vulnerable students:
 - Coordinate counseling opportunities for students;
 - Announce ongoing support for students with place, time, and staff facilitator;
 - Provide parents with a list of community resources available to students and their families.
- In case of death, provide funeral/visitation information.
- Allow staff opportunity to discuss feelings and reactions and provide list of suggested readings to teachers, parents and students.

RESUMPTION OF CLASSES

- **Re-entry into the facility.** The principal/site administrator is the individual responsible for authorizing re-entry into the school facility. A damage assessment team should:
 - survey the school after a disaster;
 - report findings to the principal/site administrator; and
 - ensure that timely and accurate data is received. **Only after the principal/site administrator has been assured by public safety officials and/or local contractors that the safety of the school has been restored should re-entry occur.**
 - **Relocation.** In the event the school is damaged to the extent that all or a portion of it is uninhabitable until repairs are made, plans must be developed to address the relocation of educational services and staff to alternate facilities until repairs are made or the school is rebuilt.
-

LONG-TERM FOLLOW-UP AND EVALUATION

- Write thank-you notes to people who provided support during the emergency.
- Be alert to anniversaries and holidays. Often students and staff will experience an “anniversary” trigger reaction the following month(s) or year(s) on the date of the emergency, or when similar crises occur.
- Amend emergency management protocols, if needed.

REPAIRS AND RESTORATION

- **Repairs or Construction on Disaster Sites.** Any repairs and rebuilding of damage wrought by school violence or natural disaster must carefully consider the input and feelings of the victims and their families. There is a strong and significant psychological connection to death sites that must run its full course and should never be discounted or ignored. Making changes and reconstruction in and around death and injury sites requires a delicate balance with the need to resume normal activities. The construction must be the result of careful and deliberate consultation with students, parents and school staff. Action should never be rushed. Families may not be ready for change and pressure may only delay or impair healing.
- **Post-Disaster Mitigation.** To break the repetitive loss cycle and create a higher level of disaster resistance, a recovery plan should specify mitigation projects that could be completed in the process of incident recovery, repair and restoration. This may mean adapting the facility for seismic retrofitting (e.g., bolting shelves and TVs to walls, file cabinets to each other, security light fixtures, etc). It also may mean changes to the social, economic and environmental factors that can affect a school’s vulnerability to the impact of hazards. Damages and injuries that occurred during the most recent crisis should be reviewed to identify preventive measures that could be taken now to mitigate the recurrence of similar damage or injuries in future incidents. Prioritize mitigation measures by degree of life safety, cost, frequency of identified potential hazard and potential number of people exposed.

F. EMOTIONAL TRAUMA AND POST TRAUMATIC STRESS

Post Traumatic Stress: A disaster is a devastating, catastrophic event that can be life threatening and produce injuries and deaths. Post Traumatic Stress is an anxiety disorder that can develop in children, adolescents or adults when individuals survive disaster-related experiences. The range of human responses to a catastrophic event may include physical, cognitive and emotional symptoms such as nausea, sleep disturbance, slowed thinking, troubled memories, regressed behavior, anxiety, guilt, depression, anger and a host of other responses.

Retraumatization: Anniversary dates, media coverage, the filing of lawsuits, or similar events in other regions can “retraumatize” a community, contributing to further depression. Some people also have feelings of inadequacy about dealing with the ongoing tragedy. For some trauma victims, these adverse effects fade with emotional support and the passage of time. Others are more deeply affected and experience long-term consequences. These reactions are normal responses to an abnormal event.

Although no one can predict who will experience the most severe reaction to trauma, the more direct the exposure to the event, the higher the risk for emotional harm.

Trauma is an acute stress response that an individual experiences when confronted with sudden, unexpected, unusual human experience. Here are some common signals of a stress reaction to trauma:

PHYSICAL	MENTAL	EMOTIONAL	BEHAVIORAL
Chest pain* Chills Difficulty breathing* Dizziness Fainting Grinding Teeth Headaches Heart races Muscle shakes Nausea Prolonged staring Severe sweating Thirst Twitches Vomiting Weakness	Confusion/blaming Disturbed thinking Indecision Insomnia Loss of time/place Nightmares Poor concentration Poor memory Poor problem-solving Poor/hyper alertness Strange images Unable to identify familiar people/things	Anxiety Depression Fear Grief Guilt Intense anger Irritability Mood swings Nervousness Overwhelmed Panic Shock Uncertainty	Alcohol/drug use Change in speech Helplessness Increased appetite Intense startle reflex Isolation Loss of appetite Misbehavior Outbursts Pacing Restlessness Suspicious Withdrawal

****Needs medical evaluation--contact a physician.***

EFFECTS OF TRAUMA ON CHILDREN

Emergencies hit children hard. It is difficult for them to understand and accept that there are events in their lives that cannot be predicted or controlled. They learn that adults cannot fix a disaster and cannot keep it from happening again.

As a result of traumatic experiences some children will show a variety of symptoms of distress. The teacher must first know a child's baseline ("usual") behavior and cultural/ethnic responses before he/she can identify "unusual" or problem behavior in a child.

- Unusual complaints of illness, stomach cramps, chest pain
- Difficulty concentrating, cannot focus
- "Feisty" or hyperactive, silly, giddy
- Any emotional display; crying, "regressed" behavior (less than age appropriate)
- Lethargic, apathetic
- Easily startled, jumpy; sense of fear or worry
- Lack of emotional expression
- Cannot tolerate change; cannot move to next task
- Staying isolated from the group
- Child seems so pressured, anxious that he/she somehow dominates, has to distract others, or is otherwise "needy"

- No eye contact (Note: In some cultures, making eye contact with adults is “defiant behavior”)
- Resistance to talking and opening up (however, child might just be shy, may have language or cultural barrier)

Tips for Teachers to Help Distressed Children

Usually a child’s emotional response to a disaster will not last long, but some problems may be present or recur for many months afterward and require the services of professionals skilled in talking with people experiencing disaster-related problems. The following may be helpful in working with distressed children:

- ❑ COPE with personal feelings of helplessness, fear or anger. This is an essential first step to being able to effectively help the children.
- ❑ LEARN to recognize the signs and symptoms of distress and post traumatic stress reactions.
- ❑ IDENTIFY children who may need crisis intervention and referral to mental health professionals or other helpers.
- ❑ PUT the emergency or critical incident in context; provide a perspective.
- ❑ COMMUNICATE a positive not helpless attitude.
- ❑ OFFER to spend time with the child or write a note. This lets the child know that he or she is in your thoughts.
- ❑ TALK about personal feelings and listen to those of the child.
- ❑ TALK with the students about the event or the anniversary of the event, as a class activity.
- ❑ ENCOURAGE older children, adolescents in particular not to try numbing or changing their feelings with alcohol or drugs.
- ❑ Children need close physical contact during times of stress to help them reestablish a sense of identity. Games involving physical touch in a structured environment that can be helpful include *London Bridge* and *Duck, Duck Goose*.
- ❑ INVITE the children or adolescents to create a mural on the topic of the traumatic event. It is recommended that this be done in small groups followed by discussion.
- ❑ INVOLVE the children in a group discussion about disaster related experiences. It is important to share your feelings and fears. This helps to legitimize their feelings, helping them feel less isolated.
- ❑ COORDINATE information between home and school. It is important for teachers to know about discussions that take place at home, in particular with fears or concerns that the child has mentioned.
- ❑ RESPOND to the children in a direct, supportive, and consistent manner.

Classroom Activities Following A Tragic Event

The following pages provide suggested questions or themes which may be effective to use in a class after a critical incident, and specific techniques to follow. Be sure the questions are “open-ended,” which means that they cannot be answered by a simple

“Yes” or “No”. Open-ended questions serve to facilitate verbal discussion. For some children, talking is not helpful. Drawing is another means of expression of feelings. Allow a full range of expression: some kids draw recognizable “things”, others draw “abstracts”. Emphasize to the children that their work will not be judged, graded or necessarily shown to others. The student is the best source for what’s going on behind the drawing. Ask him or her about it.

Suggested questions to ask/themes to represent:

- Where were you when it (the disaster/event) happened?
- What were you doing?
- Where were your friends? Where was your family?
- What was your first thought when it happened?
- What did you see? What did you hear?
- What sound did it make? What did you smell?
- How did you feel?
- What did other people around you do (during, after)?
- What was the silliest thing you did?
- Were you or anyone else you know injured?
- What happened to pets or other animals around you?
- What dreams did you have after it?
- What reminds you of it? When do you think about it?
- What do you do differently since the event?
- How do you feel now? What makes you feel better?
- How have you gotten through rough times before?
- What would you do differently if it happened again?
- How did you help others? How would you help next time?
- What can you do now to help others?

Special Considerations:

- Allow for silence for some with low language skills, shyness, discomfort, etc. Encourage peer support for these children.
- The teacher should accommodate the child.
- If a child has low English skills, consider asking for a translator or a peer to help the child express in words.
- Create a chance for verbal expression in any language, but allow students who many not want to participate the “right to pass”.

When to refer students for additional assistance

With caring and support from the school community and families, most students will recover from the effects of a crisis. Use the following guidelines to determine whether a student should be referred to a school counselor for further assistance:

- Students who continue to demonstrate an elevated emotional response (crying, worry, anxious) after their peers have discontinued to show these signs;
 - Students who are withdrawn or appear depressed;
-

- Students who appear distracted and are unable to engage in classroom assignments and activities after an ample amount of time has passed;
- Students who present behavior of a threatening nature to themselves or to others or intentionally hurt themselves;
- Students who exhibit significant behavioral change from their normal behavior, i.e., poor academic performance, weight loss, poor hygiene, distrust of others, suspected drug/alcohol use, etc.

EFFECTS OF TRAUMA ON ADULTS

First Reactions May Include:

- Numbness, shock, difficulty believing what has occurred or is in the process of occurring
- Slow or confused physical and mental reactions
- Difficulty in decision making; uncertainty about things; it may be difficult to choose a course of action or to make even small judgment calls

Ongoing Reactions May Include:

- Loss of appetite, difficulty sleeping, loss of interest or pleasure in everyday activities
- Desire to get away from everyone - even family/friends
- Emotional lability; becoming irritable or upset more quickly than usual
- Feelings of fatigue, hopelessness, helplessness
- Digestive problems; headaches or backaches
- Difficulty accepting that the emergency has had an impact or difficulty accepting support from friends and the community

Tips for distressed adults:

- Take time to relax and do things that are pleasant; positive change such as getting away for a few hours with close friends can be helpful
- Get regular exercise or participate in a sport; activity soothes anxiety and helps with relaxation
- Keep days as simple as possible; avoid taking on any additional responsibilities or new projects
- Tap sources of assistance with the workload - ask students, instructional assistants, or volunteers to help grade papers, take care of copying, or help with other time-consuming tasks.

G. WHEN SOMEONE DIES

Children may experience a number of powerful feelings when confronted with the death of a classmate or another individual. The following describes an interactive process used to facilitate a student's expression of the feelings and reactions

following a death that affects the school community. This process is most effective when the focus follows a sequence of five phases:

(1) Introductory; (2) Fact; (3) Feeling; (4) Reaction/Teaching; and (5) Closure. This process should conclude with quiet, reflective time.

1. Introductory Phase

- Introduce team members or helpers to discuss why they have been assembled and what is hoped to accomplish.
- Stress the need for confidentiality and ask for a verbal agreement to keep what is said confidential.

2. Fact Phase

- Provide all known relevant facts about the death/incident.
- Confirm the student's understanding of what happened
- Ask if anyone has or wants additional information about the death/incident
- Ask how they learned about it.
- Ask where were they when they first heard about it.
- Ask if anyone is missing from the meeting who needs to attend. Determine who are they concerned about.

3. Feeling Phase (include everyone in the discussion)

- Ask what were their first thoughts when they heard about the death/incident.
- Ask how they are feeling now.
- Ask students to tell the class about the individual(s) who died.
- Ask for some memories of him/her/them.
- Ask how do the students think he/she/they would like to be remembered.

4. Reaction/Teaching Phase

- Explore the physical, emotional and cognitive stress reactions of the group members
- Ask what are some things students usually do when they are really upset or down?
- Take this opportunity to teach a little about the grief process, if appropriate.
- Talk about effective coping techniques.
- Determine if each student has someone else to talk to.

5. Closure Phase

- Provide information about memorial service/funeral if available
- Support creative activities such as writing cards, taking a collection.
- Encourage students to support one another,
- Remind them that it may take a long time before they will feel settled and explain that is normal
- Encourage them to talk with someone in their family about their sadness

Support long-term healing by charting a course that offers support and anticipates the needs of victims and the entire community. Continued healing requires open and responsive communication lines among victims, victims' families and the school.

Support memorials and donations by creating meaningful, inclusive and healing activities and by setting parameters for media coverage to allow privacy for grieving staff and students.

Manage benchmark dates—Anticipate and prepare for anniversaries and benchmark dates and establish clear parameters for media coverage.

Handle physical reminders carefully—Any repairs and rebuilding of damage wrought by violence or natural disaster must carefully consider the input feelings of the victims and their families.

Prepare the class—The following section is designed to assist the teacher or counselor in preparing the class to help a student who has experienced a tragedy such as the death of a friend or family member prior to his/her return to the class.

- ❑ Explain what is known of the loss.
- ❑ Ask if other students have experienced the death of a friend or family member.
- ❑ Are there things people said or did that made you feel better?
- ❑ How do you think our classmate might be feeling?
- ❑ That could you say that might help him/her know you care? This is your chance to guide students responses to helpful comments as you guide them away from less helpful comments.
- ❑ What would you want someone to say to you if you experienced the death of someone close?
- ❑ Are there things you could do that may help them feel better?
- ❑ We can take our cues from the person that will guide our actions. What might some of those cues be?

Assist the student—Talk with the student before returning to class. Discuss what to share with the class and who should tell them.

- ❑ Allow the student to leave class if upset and where the student can go.
 - ❑ Arrange for a person to meet with the student during the school day if he/she needs someone to talk to.
 - ❑ Help the student to understand that he/she doesn't have to answer questions or discuss the death if he/she doesn't feel like it.
 - ❑ Encourage journal writing for older students, provide drawing materials for younger children.
 - ❑ As a teacher, be willing to negotiate homework or class expectations during the first days after returning to school.
 - ❑ Avoid cliché statements (e.g., "I know how you feel" when nobody knows the unique relationship the student had with the deceased).
 - ❑ Don't expect the student to snap back into the "old self".
 - ❑ If a student seems unaffected by the loss, remember that everybody has his/her own way of grieving.
 - ❑ Even if the student seems to be adjusting to school again, don't assume the grieving has stopped, nor the need for assurance and comfort.
-

Memorials. When anyone from the school community dies, people will often want to find ways to memorialize the student or staff member. Parents and loved ones especially want to know people miss the person and that there is great sadness with the loss. It is important to carefully think through the type of tribute that would be appropriate for the person who has died.

- ❑ Check with family members to see what kind of memorial they would prefer.
- ❑ Memorials should focus on the life lived, rather than on the death.
- ❑ Yearbook memorials should be a regular-sized picture with a simple statement such as “We’ll miss you”.
- ❑ Creating a permanent or lasting school memorial for one person sets a precedent; it would be difficult to refuse a similar memorial for another individual.
- ❑ Public sympathy may balloon into a spontaneous memorial of artwork and symbolic expressions of loss. Flowers, cards, songs, mementos and other tributes are supportive for the immediate victims and the school community. There may be a need to develop and implement a system for displaying the public generosity and grief.
- ❑ There are many other ways to support family and friends of the deceased. Examples include: cards, food, kind words, work parties for relatives, scholarship funds, contributions to a favorite charity, planting a tree and being remembered after the urgent time of the tragedy.

Suicide Response. A school’s general response to a suicide does not differ markedly from a response to any death emergency. However, some issues exclusive to suicide require specific attention.

- ❑ Acknowledge the suicide as a tragic loss of life.
- ❑ Allow students to attend funeral services and to grieve the loss of a peer without glorifying the method of death. Over-emphasis on a suicide may be interpreted by vulnerable students as a glamorization of the suicidal act, which can assign legendary or idolized status to taking one’s own life.
- ❑ Provide counseling support for students profoundly affected by the death.
- ❑ Celebrate the life of this student as you would any student who has died, but do not organize school assemblies to honor the deceased student.
- ❑ Be cautious about discussing suicide as the cause of death of students even if it is apparent. Police will likely conduct an investigation that may result in days or weeks of uncertainty.
- ❑ Consult with a surviving parent before disclosing sensitive details. Parents and family members may be reluctant to accept or acknowledge suicide as the cause or there may be family members who do not know the “apparent” cause of death.

A suicide in the school community can heighten the likelihood, in the subsequent weeks, of “copycat” suicide attempts and threats. Traumatic events can trigger extreme feelings of helplessness and hopelessness long after the initial trauma occurs. These feelings may also lead to thoughts of suicide or suicide attempts. Sometimes a new trauma will leave a survivor or family member with the feeling that they can’t handle the tragedy as well as they think people expect them to. In order to prevent further tragedies, students

considered to be especially susceptible to depression/suicide must be carefully monitored and appropriate action taken if they are identified as high risk.

H. THE “NEW NORMAL”

Victims of a crisis experience a real need to return to normal. However, “normal” as they once experienced it is forever gone and changed. For many, the recognition that such a “normal” is unattainable can be debilitating. As a result, counselors and crisis survivors find the concept of a “New Normal” to be very reassuring and accurate. While they recognize that things will never be the same, they also come to realize that a new stasis or equilibrium has arrived to replace the former “normal.” For students and staff alike, the sooner this is recognized, the better.

*Special thanks to everyone involved in these
emergency management planning efforts.*

*Together we can, and will,
make our schools safer places for our children.*

RMCS Staff Handbook

2009-2010 School Year

Draft

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ACKNOWLEDGMENT OF HANDBOOK AND AT-WILL EMPLOYMENT

I understand and agree that I will read and comply with the RMCS Handbook.

I understand and agree to my at-will employment as described in the Handbook summarized as follows:

- This Handbook does not in any way reflect a contract of employment, either expressed or implied between you and the School. The School is an at-will employer.
- Just as I am free to terminate the employment relationship with the School at any time, the School, in its sole discretion, also reserves the right to modify or terminate the employment relationship with me at any time for any or no reason. Nothing in this Handbook creates, or is intended to create, a promise or representation of continued employment or guaranteed terms and conditions of employment for any employee. Further, there is no agreement, expressed or implied, written or verbal, between the employee and the School for any specific period of employment, for continuing or long-term employment, or for guaranteed terms and conditions of employment.
- Other than **RMCS Governing Board**, no other entity or person has the authority to modify this Handbook.

I understand that other than the Administrative Director or designee, no supervisor or representative of the School has authority to enter into any agreement, expressed or implied, for employment for any specific period of time, or to make any agreement for employment other than at-will; only the **Administrative Director** or designee has the authority to make any such agreement and then only in writing signed by the **Administrative Director** or designee.

Employee's Signature: _____ Date: _____

PLEASE RETURN TO Administrative Director

INTRODUCTION

Employment At-Will

It is the policy of RMCS that all employees are employed at the will of the School for an indefinite period. Accordingly, either RMCS or the employee can terminate this relationship at any time, for any reason, without cause, and with or without notice.

Nothing contained in this Handbook, employment applications, RMCS memoranda or other materials provided to employees in connection with their employment shall require RMCS to have “cause” to terminate an employee or otherwise restrict RMCS’s right to terminate an employee at any time for any reason. Statements of specific grounds for termination set forth in this Handbook or elsewhere are not all-inclusive and are not intended to restrict RMCS’s right to terminate at-will. Other than the Board of Directors or designee, no RMCS representative is authorized to modify this policy for any employee.

No RMCS representative is authorized to modify this policy for any employee or to make any representations to employees or applicants concerning the terms or conditions of employment with RMCS that are not consistent with the School’s policy on “at-will” employment.

This policy shall not be modified by any statements contained in this Handbook or employee applications, RMCS memoranda, sales commission agreements, RMCS commission agreements, or other materials provided to employees in connection with their employment. Further, none of those documents whether singly or combined, or any employment practices shall create neither an expressed or implied contract of employment for a definite period, nor an expressed or implied contract concerning any terms or conditions of employment.

This Handbook summarizes River Montessori Charter School’s (hereinafter referred to as “School” or “Charter School”) policies, as well as your benefits and responsibilities. We urge you to read this Handbook as soon as you receive it and to speak with **the Administrative Director** regarding any questions you may have. The intent of this Handbook is to inform you of the policies regarding employment at the School. Once you have reviewed the handbook, please sign the employee acknowledgment form at the beginning of this Handbook, and provide it to the **Office Manager or Administrative Director**.

This Handbook supersedes any previously issued handbooks and or policy or benefit statements of memoranda that are inconsistent with the policies as described herein. Should you have any questions regarding any inconsistencies that may occur, please consult **the Administrative Director**.

Because the School is a growing and changing organization, it reserves full discretion to add to, modify, or delete provisions of this Handbook, or the policies and procedures on which they may be based, at any time without advance notice. The School also reserves the right to interpret any of the provisions set forth in this Handbook in any manner it deems appropriate.

I. CONDITIONS OF EMPLOYMENT**A. At-Will Employment**

This Handbook does not in any way reflect a contract of employment, either expressed or implied, between you and the School. The Charter School is an at-will employer. Accordingly, either the School or the employee can terminate this relationship at any time, for any reason, without cause, and with or without notice.

Nothing contained in this Handbook, employment applications, School memoranda or other materials provided to employees in connection with their employment shall require School to have "cause" to terminate an employee or otherwise restrict the School's right to terminate an employee at any time for any reason. Other than the **Board of Directors** or designee, no School representative is authorized to modify this policy for any employee.

B. Modifications

The Charter School reserves the right to amend, modify, add to, or delete any portion(s) of this Handbook to reflect changes in employment policy, except the at-will employment relationship cannot be changed unless in a writing that expressly states that it is changed and approved by the **Board of Directors**.

C. Equal Employment Opportunity Policy

RMCS is an equal opportunity employer. It is the policy of RMCS to afford equal employment and advancement opportunity to all qualified individuals without regard to race, creed, color, religion, national origin, ancestry, sex, sexual orientation, age, physical or mental disability, marital status, citizenship status, medical condition, or any other legally protected status. This policy extends to all employees and to all aspects of the employment relationship, including the hiring of new employees and the training, transfer, promotion, compensation and benefits of existing employees.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, RMCS will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship would result.

Any applicant or employee who requires an accommodation in order to perform the essential functions of the job should contact an RMCS representative with day-to-day personnel responsibilities and request such an accommodation. The individual with the disability should specify what accommodation he or she needs to perform the job. RMCS then will conduct an investigation to identify the barriers that interfere with the equal opportunity of the applicant or employee to perform his or her job. RMCS will identify possible accommodations, if any, that will help eliminate the limitation. If the accommodation is reasonable and will not impose an undue hardship, RMCS will make the accommodation.

D. Prohibition of Harassment1. Policy

The Charter School is committed to providing a workplace free of sexual harassment, as well as harassment based on such factors as race, religion, creed, color, national origin, ancestry, age, medical condition, marital status, sexual orientation, or disability. The School will not condone or tolerate sexual harassment of any type by any employee. This policy applies to all employee actions and relationships, regardless of position or gender. The School will promptly and thoroughly investigate any complaint of sexual harassment and take appropriate corrective action, if warranted.

The Charter School, as your employer, must take all reasonable steps to prevent discrimination and unlawful harassment from occurring. Sexual or other unlawful harassment in employment violates the School's policy and prohibited under Title VII of the Civil Rights Act and the California Fair Employment and Housing Act.

2. Definition of Harassment

Harassment includes verbal, physical, or visual conduct that creates an intimidating, offensive or hostile working environment or that unreasonably interferes with job performance. Harassment may also include unwelcome, offensive racial or ethnic slurs, jokes, or similar conduct.

3. Definition of Sexual Harassment

Federal law defines sexual harassment as unwanted sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexually suggestive nature constitute sexual harassment when: (1) Submission to such conduct is made either explicitly or implicitly a term or condition of employment; or (2) Submission to or rejection of such conduct is used as the basis for personnel decisions, including but not limited to appraisals, promotion, salary increases, and termination; or (3) Such behavior has the purpose or effect of interfering with an individual's performance on the job or creating an intimidating, hostile or offensive working environment.

California law defines sexual harassment as unwanted sexual advances or visual, verbal, or physical conduct of a sexual nature. This definition includes many forms of offensive behavior. The following is a non-exhaustive list:

- Sexual flirtations, touching, advances or propositions;
- Verbal abuse of a sexual nature;
- Graphic or suggestive comments about dress or body;
- Sexually degrading words;
- The display in the workplace of sexually suggestive or offensive objects or pictures.

4. Preventing Sexual and Other Unlawful Harassment

The Administrative Director has the responsibility to maintain a workplace free from any form of sexual harassment. Consequently, should the **Administrative Director** become aware of any conduct that may constitute sexual harassment or other prohibited behavior, immediate action should be taken to address and remediate such conduct.

Any employee who has experienced or is aware of a situation, which is believed to be sexually harassing, has a responsibility to report the situation immediately to the **Administrative Director**. A Sexual Harassment Complaint Form may be obtained from the Office Manager or Administrative Director. The Administrative Director will conduct an immediate investigation into the allegation(s) and determine whether the allegations have merit. A written report, including findings related to the allegations, will be completed. In all cases, when the allegation(s) is determined to be valid, appropriate remedial action will be taken immediately and such action may include disciplinary action up to and including termination.

If the alleged sexual harassment involves the Administrative Director, or if the employee is not satisfied with the outcome of the investigation, the employee should bring the matter to the attention of the **President of the RMCS governing board**.

5. Investigations and No Retaliation Policy

All complaints of sexual harassment will be investigated promptly, objectively and as confidentially as possible. Employees are required to cooperate in any investigation. Retaliation against any employee for filing a complaint or participating in an investigation is strictly prohibited and shall be cause for termination.

II. EMPLOYMENT POLICIES AND PRACTICES

A. Certification and Licensure

The School's core academic teachers are required to hold a current California Commission on Teacher Credentialing certificate, permit, or other document equivalent to that which a teacher in other public schools would be required to hold.

In addition to the California Credential, each teacher must hold a Montessori Certification from a MACTE accredited training center or be currently enrolled in a Montessori Training Program which is accredited.

B. Clerical, Other Staff, Substitutes, and Consultants

The School's clerical and non-teaching staff, substitutes, and consultants will demonstrate the abilities necessary to effectively carry out their responsibilities as further specified in applicable job descriptions.

C. Employee Reviews and Evaluations

Each employee will receive periodic performance reviews conducted by his or her supervisor. Performance evaluations will be conducted annually, on or about the anniversary date of your employment with the School. The frequency of performance evaluations may vary depending upon length of service, job position, past performance, changes in job duties, or recurring performance problems.

Your performance evaluations may review factors such as the quality and quantity of the work you perform, your knowledge of the job, your initiative, your work attitude, and your attitude toward others. The performance evaluations are intended to make you aware of your progress, areas for improvement, and objectives or goals for future work performance. Favorable performance evaluations do not guarantee increases in salary or promotions. Salary increases and promotions are solely within the discretion of the School and depend upon many factors in addition to performance. After the review, you will be required to sign the evaluation report simply to acknowledge that it has been presented to you, that you have discussed it with your supervisor, and that you are aware of its contents.

Newly hired employees will have their performance goals reviewed by their supervisor/manager within the first 90 days of employment.

On a periodic basis, your supervisor will review your job performance with you in order to establish goals for future performance and to discuss your current performance. The School's evaluation system will in no way alter the employment at-will relationship.

D. Personnel Files and Record-Keeping Protocols

At the time of your employment, a personnel file is established for you. Please keep the **Office Manager or Administrative Director** advised of changes that should be reflected in your personnel file. Such changes include: change in address, telephone number, marital status, number of dependents and person(s) to notify in case of emergency. Prompt notification of these changes is essential and will enable the School to contact you should the change affect your other records.

You have the right to inspect certain documents in your personnel file, as provided by law, in the presence of a School representative, at a mutually convenient time. No copies of documents in your file may be made with the exception of documents you have previously signed. You may add your comments to any disputed item in the file. The School will restrict disclosure of your personnel file to authorized individuals within the School. A request for information contained in the personnel file must be directed to your supervisor. Only the **Administrative Director** is authorized to release information about current or former employees. Disclosure of information to outside sources will be limited. However, the School will cooperate with requests from authorized law enforcement or local, state or federal agencies conducting official investigations or as otherwise legally required.

E. Child Neglect and Abuse Reporting

Any employee who knows or reasonably suspects a child has been the victim of child abuse shall report the instance to a child protective agency. Child abuse is broadly defined as “a physical injury that is inflicted by other than accidental means on a child by another person.” School employees are required to report instances of child abuse when the employee has a “reasonable suspicion” that child abuse has occurred. Reasonable suspicion arises when the facts surrounding the incident or suspicion could cause another person in the same situation to suspect child abuse.

Child abuse should be reported immediately by phone to a child protective agency. The phone call is to be followed by a written report within thirty-six (36) hours. There is no duty for the reporter to contact the child’s parents. In fact, if a child is released to a peace officer or a child protective agency agent, the reporter shall not notify the parent as required in other instances of removal.

F. Conflict of Interest

All employees must avoid situations involving actual or potential conflict of interest.

An employee involved in any relationships or situations, which they believe may constitute a conflict of interest, should immediately and fully disclose the relevant circumstances to his or her immediate supervisor, or any other appropriate supervisor, for a determination about whether a potential or actual conflict exists. If an actual or potential conflict is determined, the School may take whatever corrective action appears appropriate according to the circumstances. Failure to disclose facts shall constitute grounds for disciplinary action.

G. Attendance and Tardiness

If you find it necessary to be absent or late, you are expected to telephone the **Administrative Director** as soon as possible but no later than 7:00 am. If you are a teacher, you are also responsible to arrange for a qualified substitute to be approved by the Director. If you are absent from work longer than one day, you are expected to keep the **Administrative Director** sufficiently informed of your situation.

H. Drug Free Workplace

The School complies with all Federal and State regulations regarding drug use while on the job. This policy covers all employees who are violators of any one of the following prohibitions:

1. Use, possession, offer for sale, or being under the influence of illegal drugs during working hours, including lunch and break periods, or in the presence of pupils.
2. Use, possession, offer for sale, or being under the influence of illegal drugs on School property at any time.

For purposes of this policy, engaging in any of the activities above shall be considered as a violation of School policy.

I. Confidential Information

All information relating to students including, Schools, addresses, contact numbers, and progress information is confidential information, and may not be shared with unauthorized parties. All records concerning special education pupils shall be kept strictly confidential and maintained in separate files.

J. Use of E-Mail, Voicemail and Internet Access

The School will permit employees to use its electronic mail, voicemail systems and Internet access subject to the following:

1. Minimal personal use as long as it does not interfere with timely job performance and is consistent with law and appropriate protocols.
2. The E-mail system and Internet access is not to be used in any way that may be disruptive, offensive to others, or harmful to morale. For example, sexually explicit images, ethnic slurs, racial epithets, or anything else that may be construed as harassment or disparagement of others based on their race, national origin, sex, sexual orientation, age, religious beliefs or political beliefs may not be displayed or transmitted.
3. Employees should not attempt to gain access to another employee's personal file of E-mail or a voicemail message without the latter's express permission.
4. The School staff will not enter an employee's personal E-mail files or voicemail unless there is a business need to do so. The School retains a copy of all passwords; passwords unknown to the School may not be used. System security features, including passwords and delete functions, do not neutralize the School's ability to access any message at any time. Employees must be aware that the possibility of such access always exists.

L. Hours of Work, Overtime, and Paydays

Business hours are normally 8 am to 4 pm, Monday through Friday. The regular workday schedule for non-exempt employees is 8 hours; the regular workweek schedule is 40 hours. Exempt employees (salaried employees) are also generally expected to be present during business hours and to commit whatever additional time is necessary to satisfactorily complete all job requirements.

For non-exempt employees (hourly employees), work hours *are specific for each employee*. Non-exempt employees receive one ten-minute paid break periods for every four hours of work. In addition, full-time non-exempt employees are provided with a 30-minute meal period to be taken approximately in the middle of the workday. The school reserves the right to modify an employees starting and quitting times and the number of hours worked.

All non-exempt employees who work more than eight hours in one workday or more than forty hours in one workweek will receive overtime pay computed as follows: 1) overtime at the rate of one and one-half times the employees regular rate of pay for all hours worked in excess of forty (40) in any one workweek, 2) overtime at the rate of one and one-half times the employees regular rate of pay for the first four (4) hours worked in excess of eight (8) hours in any one workday, and for the first eight (8) hours on the seventh day of work in any one workweek, 3) overtime at the rate of double the employee regular rate of pay for all hours worked in excess of twelve (12) in one workday, and for all hours worked in excess of eight (8) on the seventh day of work in one workweek.

Only those hours that are actually worked are counted to determine the employees overtime pay. Compensated holidays, for example, are not hours worked and are therefore not counted in making overtime calculations.

Unless otherwise provided, for purposes in calculating overtime, each workweek begins on Sunday and each workday begins at midnight.

No non-exempt employee may work overtime without the express prior approval of his or her supervisor.

Paydays are scheduled on the **Last Day** of each month for salaried employees and the **10th of the month** for hourly employees. If you observe any errors in your check, please report it immediately to your supervisor.

L. Smoking

All School buildings and facilities are non-smoking facilities.

M. Personal Business

The School's facilities for handling mail and telephone calls are designed to accommodate School business. Please have your personal mail directed to your home address and limit personal telephone calls to an absolute minimum. Long distance toll calls may not be made from the School's telephone system. If you need to make a personal call it should be made on a personal calling card or cell phone. Do not use School material, time or equipment for personal projects. Although there are phones available in the classroom, these are to be used for emergency situations or to conduct school business. Calls should be limited to emergencies if children are present. Other school business can be conducted when students are not in the classroom in need of monitoring.

N. Health and Safety Policy

The School is committed to providing and maintaining a healthy and safe work environment for all employees. Accordingly, the School has instituted an Injury and Illness Prevention Program designed to protect the health and safety of all personnel. Every employee will receive a copy of the Injury and Illness Prevention Program, which is kept by the Office Manager and is available for your review.

You are required to know and comply with the School's General Safety Rules and to follow safe and healthy work practices at all times. You are required to report immediately to your supervisor any potential health or safety hazards, and all injuries or accidents.

In compliance with Proposition 65, the School will inform employees of any known exposure to a chemical known to cause cancer or reproductive toxicity.

O. TB Testing

No person shall be employed by the School unless the employee has submitted proof of an examination within the last four (4) years that the employee is free of active tuberculosis. This examination shall consist of an X-ray of the lungs or an approved intradermal tuberculin test which if positive shall be followed by an X-ray of the lungs. Thereafter all employees shall be required to undergo the foregoing examination at least once every four (4) years, excepting "food handlers" who shall be examined annually. After such examination each employee shall cause to be on file a certificate with the School from the examining physician showing the employee was examined and found free from active tuberculosis.

The examination is a condition of initial employment and the expense incident thereto shall be born by the applicant.

P. Criminal Background Checks

It is the policy of the School to require fingerprinting and background checks for its employees consistent with legal requirements.

The School may, on a case-by-case basis, require an entity providing school site services to certify that the entity's employees comply with the requirements for fingerprinting, unless the School determines that the employees of the entity will have limited contact with pupils. In determining whether a contract employee will have limited contact with pupils, the School must consider all relevant circumstances, including factors such as the length of time the

contractors will be on school grounds, whether pupils will be in proximity with the site where the contractors will be working, and whether the contractors will be working by themselves or with others. If the School makes this determination, the School shall take appropriate steps to protect the safety of any pupils that may come in contact with these employees. If a School requires an entity to comply with the fingerprinting requirements, the entity is required to comply with this section.

According to RMCS standards, all parent classroom volunteers must be fingerprinted before they can work in the classroom. For all other volunteers, the **Administrative Director** shall determine whether the volunteer will have more than limited contact with pupils or otherwise consider other factors requiring a criminal background check for such volunteers.

R. Security Protocols

The School has developed guidelines to help maintain a secure workplace. Be aware of unknown persons loitering in parking areas, near the ball fields, in the back field beyond the gate, or anyone who does not look familiar on campus. Report any suspicious persons or activities to security personnel or to the office staff. Secure your classroom or work area at the end of the day. When called away from your work area for an extended length of time, do not leave valuable or personal articles around your workstation that may be accessible. The security of facilities as well as the welfare of our employees and students depends upon the alertness and sensitivity of every individual to potential security risks. You should immediately notify your supervisor when keys are missing.

We have a large amount of open space which is available for the children to explore. Please be aware of where your students are at all times. There should not be children on the backside of any building unattended. Children may work in the courtyard as an extension of the classroom; however, the door to the classroom must remain open when students are out of the classroom.

If a parent comes to your classroom during the school day they should have their volunteer badge or a visitor badge visible. If they are not displaying one of these badges please insist that they return to the office for this badge.

Children should never be dismissed to any adult, including a parent, without a signed release form from the office. If a parent comes to remove their child from school and does not have one of these slips, please refer them to the office.

Accident/Incident Reporting. It is the duty of every employee to immediately or as soon as is practicable report any accident or injury occurring during work or on RMCS premises so that arrangements can be made for medical or first aid treatment, as well as for investigation and follow-up purposes.

Reporting Fires and Emergencies. It is the duty of every employee to know how to report fires and other emergencies quickly and accurately. Employees should report any such emergency by calling management. In addition, all employees should know your local emergency numbers such as 911.

S. Payroll Withholdings

The School is required by law to withhold Federal Income Tax, State Income Tax, Social Security (FICA) and State Disability Insurance from each employee's pay as follows:

1. Federal Income Tax Withholding: The amount varies with the number of exemptions the employee claims and, of course, the gross pay amount.
2. State Income Tax Withholding: The same factors, which apply to federal withholdings, apply to state withholdings.
3. Social Security (FICA): The Federal Insurance Contribution Act requires that a certain percentage of employee earnings be deducted and forwarded to the federal government, together with an equal amount contributed by the school. Not applicable to credentialed employees.
4. California Teachers Retirement System (CALSTRS): CalSTRS members do not pay into Social Security, therefore, if you expect to receive a Social Security benefit and a CalSTRS retirement benefit you need to know about two Social Security provisions that may reduce your Social Security benefit. They are the Windfall Elimination Provision and the Government Pension Offset. Your CalSTRS retirement benefit or Medicare benefit will not be reduced because of these provisions in Social Security law.

RMCS handles the distribution and withholdings for RMCS employees. Any mistakes in your payroll check should be brought to the Administrative Director and to the RMCS payroll department.

You may change the number of withholding allowances you wish to claim for Federal Income Tax purposes at any time by filling out a new W-4 form and submitting it to your supervisor. Your office maintains a supply of these forms.

All Federal, State, and Social Security taxes will be automatically deducted from paychecks. Federal Withholding Tax deduction is determined by the employee's W-4 form. The W-4 form should be completed upon hire and it is the employee's responsibility to report any changes in filing status to the Office Manager and to fill out a new W-4 form.

At the end of the calendar year, a "withholding statement" (W-2) will be prepared and forwarded to each employee for use in connection with preparation of income tax returns. The W-2 shows Social Security information, taxes withheld and total wages.

T. Expense Reimbursements

Each classroom will be given a budget for the year. Teachers can be reimbursed up to the limit on that budget. Co-Teachers should discuss any item, which will be purchased for the classroom. Budgets are developed for the entire classroom and not individual teachers.

- Turn in original receipts only. Copies will not be accepted.
- Put receipts in envelope with your name on the front.
- Put envelope in Administrative Director's Mail Box.

Teachers are eligible for \$500 worth of conference reimbursement. Please see Office Manager for Conference Reimbursement forms.

U. Academic Freedom

Teachers must be free to think and to express ideas, free to select and employ materials and methods of instruction within the School's curriculum framework, free from undue pressures of authority, and free to act within his/her professional group. Such freedom should be used judiciously and prudently to the end that it is in concert with established community standards and promotes the free exercise of intelligence and student learning.

Academic freedom is not an absolute. It must be exercised within the basic ethical responsibilities of the teaching profession. Those responsibilities include:

- An understanding of our democratic traditions and methods.
- A concern for the welfare, growth, maturity and development of children.
- The use of accepted scholastic methods.
- Application of good taste and judgment in selecting and employing materials and methods of instruction.

In addition, teacher's have the responsibility to inform the Administrative Director of educational activities that affect the normal school day operations. (i.e., field trips, movies, parties or celebrations)

V. Professional Behavior

All employees are expected to treat students, staff, and parents with respect at all times. If there is a disagreement, this is to be handled at the appropriate time and through the appropriate protocol.

If a teacher feels that a parent has behaved inappropriately, this matter should be brought to the Administrative Director's attention immediately.

W. Personal Appearance

Employees are expected to wear clothing appropriate for the nature of our business and the type of work performed. Because each employee is a representative of RMCS in the eyes of the public, each employee must report to work properly groomed, wearing appropriate clothing and maintaining a professional appearance. When working with students and the public, staff should not wear revealing clothes. (This includes shorts that are above mid-thigh and any shirts which expose midriff or excessive cleavage.)

All clothing should be clean and without rips or holes. Acceptable casual dress excludes ripped or torn clothing, T-shirts of any kind (with or without a written message), tank or halter tops.

T-Shirts and blue jeans/ or appropriate athletic attire can be worn on P.E. days.

III. EMPLOYEE BENEFITS AND LEAVE**A. Medical Coverage**

August 1 of your first year of employ you are eligible for medical coverage if you are a full-time regular employee working for the School. Each full time employee is given \$372/month towards the sum of his/her medical coverage. The School health plan does not cover the cost of medical coverage for dependents. You can receive summary descriptions of the School's benefit plans from the **Administrative Director**.

B. Holidays

The following holidays are generally taken by public entities, including public schools:

- New Year's Day
- Martin Luther King, Jr., Birthday
- President's Day
- Memorial Day
- Independence Day
- Labor Day
- Veteran's Day
- Thanksgiving
- Friday after Thanksgiving
- Day before Christmas
- Christmas Day

C. Paid Time Off

Sick leave is a form of insurance that employees accumulate in order to provide a cushion for incapacitation due to illness or injury. It is intended to be used only when actually required to recover from illness or injury. Time off for medical and dental appointments will be treated as sick leave. The School will not tolerate abuse or misuse of your sick leave privilege.

The School offers paid personal leave to regular full-time employees when personal emergencies arise. Paid time off (sick and personal) accrues at a rate of one day per month of employment each year for a total of 10 days for employees on a 10 month contract and a total of 11 days for employees on 11 month contracts. Accrued sick leave does not carry over from year to year and the School does not pay employees in lieu of unused sick leave.

If you are absent longer than 3 days due to illness, medical evidence of your illness and/or medical certification of your fitness to return to work satisfactory to the School will be required before the School honors any sick pay requests. Once an employee has exhausted sick leave, the employee may continue on an unpaid medical leave, if eligible under applicable medical leave law, depending upon the facts and circumstances of the employee's basis for leave beyond accrued sick leave.

D. Unpaid Leave of Absence

The School recognizes that special situations may arise where an employee must leave his or her job temporarily. At its discretion, the Administrative Director may grant employees unpaid leave of absence.

The granting of an unpaid leave of absence always presumes the employee will return to active work by a designated date or within a specific period.

If you are currently covered, medical, and dental coverage will remain in force during a medical or worker's compensation leave of absence, provided you pay the appropriate premiums. Whether you are required to pay your own premiums will depend upon the length of your leave of absence. During a family/medical leave, your medical and dental benefits will remain in force provided you pay the appropriate premiums. Benefits are terminated the day any other type of leave begins.

No sick days are accrued during any type of unpaid leave.

E. Family Care and Medical Leave

The Charter School complies with the federal Family and Medical Leave Act ("FMLA") and the California Family Rights Act ("CFRA"), both of which require the School to permit each eligible employee to take up to 12 workweeks of FMLA leave in any 12-month period for the birth/adoption of a child, the employee's own serious illness or to care for certain family members who have a serious illness. For purposes of this policy, all leave taken under FMLA or CFRA will be referred to as "FMLA leave."

1. Employee Eligibility Criteria

To be eligible for FMLA leave, the employee must have been employed by the School for the last 12 months and must have worked at least 1,250 hours during the 12-month period immediately preceding commencement of the FMLA leave.

2. Events That May Entitle an Employee to FMLA Leave

The 12-week FMLA allowance includes any time taken (with or without pay) for any of the following reasons:

- a. To care for the employee's newborn child or a child placed with the employee for adoption or foster care.
- b. Because of the employee's own serious health condition (including a serious health condition resulting from an on-the-job illness or injury) that makes the employee unable to perform any one or more of the essential functions of his or her job (other than a disability caused by pregnancy, childbirth, or related medical conditions, which is covered by the School's separate pregnancy disability policy).
- c. To care for a spouse, child, or parent with a serious health condition.
- d. A "serious health condition" is an illness, injury, impairment, or physical or mental condition that involves: (1) inpatient care (i.e., an overnight stay) in a hospital, hospice, or residential medical care facility, including any period of incapacity or any subsequent treatment in connection with such inpatient care; or (2) continuing treatment by a health care provider.

3. Amount of FMLA Leave That May Be Taken

- a. FMLA Leave can be taken in one or more periods, but may not exceed 12 workweeks total for any purpose in any 12-month period, as described below, for any one, or combination of the above-described situations. "Twelve workweeks" means the equivalent of twelve of the employee's normally scheduled workweeks. For a full-time employee who works five eight-hour days per week, "twelve workweeks" means 60 working and/or paid eight-hour days.
- b. The "12-month period" in which 12 weeks of FMLA Leave may be taken is the 12-month period immediately preceding the commencement of any FMLA Leave.

4. Health Benefits

The provisions of the School's various employee benefit plans govern continuing eligibility during FMLA Leave, and these provisions may change from time-to-time. The health benefits of employees on FMLA Leave will be paid by the School during the leave at the same level and under the same conditions, as coverage would have been provided if the employee had been continuously employed during the leave period. When a request for FMLA Leave is granted, the School will give the employee written confirmation of the arrangements made for the payment of insurance premiums during the leave period.

5. Medical Certifications

- a. An employee requesting FMLA Leave because of his or her own or a relative's serious health condition must provide medical certification from the appropriate health care provider on a form supplied by the School. Failure to provide the required certification in a timely manner (within 15 days of the leave request) may result in denial of the leave request until such certification is provided.
- b. If the School has reason to doubt the medical certification supporting a leave because of the employee's own serious health condition, the School may request a second opinion by a health care provider of its choice (paid for by the School). If the second opinion differs from the first one, the School will pay for a third, mutually agreeable, health care provider to provide a final and binding opinion.
- c. Recertification is required if leave is sought after expiration of the time estimated by the health care provider. Failure to submit required recertification can result in termination of the leave.

6. Procedures for Requesting and Scheduling FMLA Leave

- a. An employee should request FMLA Leave by completing a Request for Leave form and submitting it to the Administrative Director. An employee asking for a Request for Leave form will be given a copy of the School's then-current FMLA Leave policy.

- b. Employees should provide not less than 30 days' notice or such shorter notice as is practicable, for foreseeable childbirth, placement, or any planned medical treatment for the employee or his/her spouse, child, or parent. Failure to provide such notice is grounds for denial of a leave request, except if the need for FMLA Leave was an emergency or was otherwise unforeseeable.
- c. If FMLA Leave is taken because of the employee's own serious health condition or the serious health condition of the employee's spouse, parent or child, the leave may be taken intermittently or on a reduced leave schedule when medically necessary, as determined by the health care provider of the person with the serious health condition.
- e. If FMLA Leave is taken because of the birth of the employee's child or the placement of a child with the employee for adoption or foster care, the minimum duration of leave is two weeks, except that the School will grant a request for FMLA Leave for this purpose of at least one day but less than two weeks' duration on any two occasions.
- f. If an employee needs intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment for the employee or a family member, the employee may be transferred temporarily to an available alternative position for which he or she is qualified that has equivalent pay and benefits and that better accommodates recurring periods of leave than the employee's regular position.
- g. In most cases, the School will respond to a FMLA Leave request within two days of acquiring knowledge that the leave is being taken for an FMLA-qualifying reason and, in any event, within 10 days of receiving the request. If an FMLA Leave request is granted, the School will notify the employee in writing that the leave will be counted against the employee's FMLA Leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

7. Return to Work

- a. Upon timely return at the expiration of the FMLA Leave period, an employee is entitled to the same or a comparable position with the same or similar duties and virtually identical pay, benefits, and other terms and conditions of employment unless the same position and any comparable position(s) have ceased to exist because of legitimate business reasons unrelated to the employee's FMLA Leave.
- b. When a request for FMLA Leave is granted to an employee, the School will give the employee a written guarantee of reinstatement at the termination of the leave, subject to limitations under the law.
- c. Before an employee will be permitted to return from FMLA Leave taken because of his or her own serious health condition, the employee must obtain a certification from his or her health care provider that he or she is able to resume work.
- d. If an employee can return to work with limitations, the School will evaluate those limitations and, if possible, will accommodate the employee as required by law. If accommodation cannot be made, the employee will be medically separated from the School.

8. At your option, you can use accrued sick days for the year as part of your disability leave before taking the remainder of your leave as an unpaid leave. We may require that you use up any available sick leave during your leave. You may also be eligible for state disability insurance for the unpaid portion of your leave.
9. Taking a Pregnancy Disability Leave may impact certain of your benefits and your seniority date. If you want more information regarding this policy and your eligibility for leave, the impact of the leave on your seniority and benefits, and our policy on other disabilities, please contact the Administrative Director.

F. Pregnancy Disability Leave

This policy explains how the School complies with the California Pregnancy Disability Act, which requires School to give each female employee an unpaid leave of absence of up to four (4) months, as needed, for the period(s) of time a woman is actually disabled by pregnancy, childbirth, or related medical conditions.

1. Employee Eligibility Criteria

To be eligible for Pregnancy Disability Leave, the employee must be disabled by pregnancy, childbirth, or a related medical condition and must provide appropriate medical certification concerning the disability.

2. Events that May Entitle an Employee to Pregnancy Disability Leave

- a. The four-month Pregnancy Disability Leave allowance includes any time taken (with or without pay) for any of the following reasons:
- b. The employee is unable to work at all or is unable to perform any one or more of the essential functions of her job without undue risk to herself, the successful completion of her pregnancy, or to other persons because of pregnancy or childbirth, or because of any medically recognized physical or mental condition that is related to pregnancy or childbirth (including severe morning sickness); or
- c. The employee needs to take time off for parental care.

3. Duration of Pregnancy Disability Leave

Pregnancy Disability Leave may be taken in one or more periods, but not to exceed four months total. "Four months" means the number of days the employee would normally work within four months. For a full-time employee who works five eight hour days per week, four months means 88 working and/or paid eight hour days of leave entitlement based on an average of 22 working days per month for four months.

Pregnancy disability leave does not count against the leave, which may be available as Family Care, and Medical Leave.

4. Pay During Pregnancy Disability Leave

An employee on Pregnancy Disability Leave must use all accrued paid sick leave and may use any or all accrued vacation time at the beginning of any otherwise unpaid leave period.

The receipt of vacation pay, sick leave pay, or state disability insurance benefits will not extend the length of Pregnancy Disability Leave.

Vacation pay and sick pay accrues during any period of unpaid Pregnancy Disability Leave only until the end of the month in which the unpaid leave began.

5. Health Benefits

The provisions of School's various employee benefit plans govern continued eligibility during Pregnancy Disability Leave and these provisions may change from time to time. When a request for Pregnancy Disability Leave is granted, the School will give the employee written confirmation of the arrangements made for the payment of insurance premiums during the leave period.

6. Seniority

An employee on Pregnancy Disability Leave remains an employee of the School and a leave will not constitute a break in service. When an employee returns from Pregnancy Disability Leave, he or she will return with the same seniority he or she had when the leave commenced.

7. Medical Certifications

- a. An employee requesting a Pregnancy Disability Leave must provide medical certification from her healthcare provider on a form supplied by the School. Failure to provide the required certification in a timely manner (within fifteen (15) days of the leave request) may result in a denial of the leave request until such certification is provided.
- b. Re-certifications are required if leave is sought after expiration of the time estimated by the healthcare provider. Failure to submit required re-certifications can result in termination of the leave.

8. Requesting and Scheduling Pregnancy Disability Leave

- a. An employee should request Pregnancy Disability Leave by completing a Request for Leave form and submitting it to her supervisor. An employee asking for a Request for Leave form will be referred to School's then current Pregnancy Disability Leave policy.
- b. Employee should provide not less than thirty (30) days or as short of notice as is practicable, if the need for the leave is foreseeable. Failure to provide such notice is grounds for denial of the leave request, except if the need for Pregnancy Disability Leave was an emergency and was otherwise unforeseeable.
- c. Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt School's operations.
- d. Pregnancy Disability Leave may be taken intermittently or on a reduced leave schedule when medically advisable, as determined by the employee's healthcare provider.

- e. If an employee needs intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment, the employee may be transferred temporarily to an available alternative position for which he or she is qualified that has equivalent pay and benefits that better accommodates recurring periods of leave than the employee's regular position.
 - f. In most cases, the School will respond to a Pregnancy Disability Leave request within two (2) days of acquiring knowledge that the leave qualifies as pregnancy disability and, in any event, within ten (10) days of receiving the request. If a Pregnancy Disability Leave request is granted, the School will notify the employee in writing and leave will be counted against the employee's Pregnancy Disability Leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.
9. Return to Work
- a. Upon timely return at the expiration of the Pregnancy Disability Leave period, an employee is entitled to the same position unless the employee would not otherwise have been employed in the same position (at the time reinstatement is requested). If the employee is not reinstated to the same position, she must be reinstated to a comparable position unless there is no comparable position available, but filling that position with the returning employee would substantially undermine School's ability to operate the business safely and efficiently. A "comparable" position is a position that involves the same or similar duties and responsibilities and is virtually identical to the employee's original position in terms of pay, benefits, and working conditions.
 - b. When a request for Pregnancy Disability Leave is granted to an employee, the School will give the employee a written guarantee of reinstatement at the end of the leave (with the limitations explained above).
 - c. Before an employee will be permitted to return from a Pregnancy Disability Leave of three days or more, the employee must obtain a certification from her healthcare provider that she is able to resume work.
 - d. If the employee can return to work with limitations, the School will evaluate those limitations and, if possible, will accommodate the employee as required by law. If accommodation cannot be made, the employee will be medically separated from the school.
10. Employment During Leave
- An employee on Pregnancy Disability Leave may not accept employment with any other employer without School's written permission. An employee who accepts such employment will be deemed to have resigned from employment with the school.

G. Worker's Compensation

All School personnel are covered by Worker's Compensation Insurance. Employees are required to report any accidents and/or injuries occurring on the job to the Administrative Director immediately so that the required reports can be completed.

The School, in accordance with State law, provides insurance coverage for employees in case of work-related injuries. The worker's compensation benefits provided to injured employees may include:

- Medical care;
- Cash benefits, tax-free to replace lost wages; and
- Vocational rehabilitation to help qualified injured employees return to suitable employment.

To ensure you receive any Worker's Compensation Benefits to which you may be entitled, you will need to:

- Immediately report any work-related injury to your supervisor;
- Seek medical treatment and follow-up care if required;
- Complete a written Employee's Claim Form (DWC Form 1) and return it to your supervisor; and
- Provide the School with a certification from your health care provider regarding the need for worker's compensation disability leave as well as your eventual ability to return to work from the leave. It is the School's policy that when there is a job-related injury, the first priority is to insure that the injured employee receives appropriate medical attention. The School, with the help of its insurance carrier has selected medical centers to meet this need. Each medical center was selected for its ability to meet anticipated needs with high quality medical service and a location that is convenient to the School's operation.
- If an employee is injured on the job, he/she is to go or be taken to the approved medical center for treatment. If injuries are such that they require the use of emergency medical systems (EMS) such as an ambulance, the choice by the EMS personnel for the most appropriate medical center or hospital for treatment will be recognized as an approved center.
- All accidents and injuries must be reported to the employee's supervisor and to the individual responsible for reporting to the School's insurance carrier. Failure by an employee to report a work-related injury by the end of his/her shift could result in loss of insurance coverage for the employee. An employee may choose to be treated by his/her personal physician at his/her own expense, but he/she is still required to go to the School's approved medical center for evaluation. All job-related injuries must be reported to the appropriate State Worker's Compensation Bureau and the insurance carrier.
- When there is a job-related injury that results in lost time, the employee must have a medical release from the School's approved medical facility before returning to work.
- Any time there is a job-related injury, the School's policy requires drug/alcohol testing along with any medical treatment provided to the employee.

H. Military Leave of Absence

The School will grant employees a military leave of absence to the extent required by applicable federal and state law.

I. Jury and Witness Duty

The School will provide employees time off to serve as required by law, on a jury or grand jury if the employee provides reasonable advance notice. The school will also provide employees with time off to: 1) appear in court or other judicial proceeding as a witness to comply with a valid subpoena or other court order, or 2) obtain any relief including a temporary restraining order, to help ensure the health, safety, or welfare of a domestic violence victim or his or her child. Leaves under this section will be unpaid.

J. Voting Time Off

Employees who do not have sufficient time outside of their regular working hours to vote in a statewide election may request time off to vote. If possible, employees should make their request at least two days in advance of the election. Up to two hours of paid time off will be provided, at the beginning or the end of the employee's regular shift, whichever will allow the most free time for voting and the least time off work.

K. Bereavement Leave

Full Time Employees will be allowed up to **3** consecutive working days off to arrange and attend the funeral of an immediate family member. For purposes of this policy, an employee's immediate family member is defined to include a current spouse, father, mother, sister, brother, children, current parent-in-law, grandparents, and grandchildren.

If any employee requires more than three days off for bereavement leave, the employee may request additional unpaid leave or may request the opportunity to use any accrued sick/personal time.

IV. TERMINATION OF EMPLOYMENT

Should it become necessary for you to terminate your employment with the School, please notify your supervisor regarding your intention as far in advance as possible. At least two weeks notice is expected whenever possible.

If you are participating in the medical and/or dental plan, you will be sent information on your rights under COBRA.

A. Misconduct Subject to Discipline or Dismissal

The following violations are considered misconduct and may result in disciplinary action up to and including termination of employment. Since it is impossible to enumerate every act or omission that would justify the imposition of disciplinary action, the list is not intended to be all-inclusive. Further, the specification of this list of conducts in no way alters the at-will employment relationship.

1. Unexcused absence and/or lack of punctuality.
2. Release of confidential information without authorization.
3. Possession of or reporting to work while under the influence of alcohol, narcotics, and/or other controlled substances.
4. Theft.
5. Willful destruction of property.
6. Conviction of a felony or conviction of a misdemeanor which makes the employee unfit for the position.
7. Falsification, fraud, or omission of pertinent information when applying for a position.
8. Any willful act that endangers the safety, health or well-being of another individual.
9. Any act of sufficient magnitude to cause disruption of work or gross discredit to the school.
10. Misuse of school property or funds.
11. Possession of firearms, or any other weapon, while acting within the course of school of your employment with the school.
12. Acts of discrimination or illegal harassment based on gender, ethnicity, or any other basis protected by state or federal law.
13. Failure to comply with the school's safety procedures.
14. Insubordination.
15. Failure to follow any known policy or procedure of the School, or gross negligence that results in a loss to the School.
16. Violations of federal, state, or local laws affecting the organization or your employment with the organization.
17. Unacceptable job performance.
18. Dishonesty
19. Failure to keep a required license, certification or permit current and in good standing.
20. Any negligence which results in harm to a child.

B. Employee Discipline Procedures *(awaiting legal and Board approval on this section)*

The following procedure will be used in regards to Employee Discipline. Please reference Section IV.A of the Employee Handbook for examples of employee misconduct that would lead to disciplinary action and/or termination. As stated, the list provided in Section IV.A of the Employee Handbook is not to be considered all-inclusive and in no way alters the at-will employment relationship.

- 1. Misconduct is noted using the Employee Discipline Action Form (EDAF). All sections pertinent to the incident must be completed.*
- 2. A copy of the completed Employee Discipline Action Form is distributed to all parties involved in the incident.*
- 3. A conference is scheduled among concerned parties and the Administrator to discuss incident and actions to be taken (up to and including further conferencing with RMCS Board and termination).*
- 4. Employee Discipline Conference Form (EDCF) is completed and distributed to all concerned parties.*
- 5. Any concerned party may complete and file an Employee Discipline Action Rebuttal Form. The form will be distributed and filed with pertinent documents (EDAF and EDCF)*

C. Non-Disclosure of Personnel Information

Reasons for involuntary terminations are privileged information and are treated confidentially. Anyone disclosing such information inappropriately is subject to disciplinary action, up to and including termination of employment.

Inquiries regarding an employee who has been terminated should be referred to the **RMCS governing board**.

D. Resignation

Employees are free to resign without repercussion or retaliation. The School prefers at least two weeks days advance notice from a resigning employee. However, the School may ask an employee to leave immediately. Any accrued and unpaid compensation shall be paid to the employee as soon as possible as required under the law.

E. Retirement

Retirement at age 65 is not compulsory.

F. Salary and Benefits In the Event of Termination

In the event of termination of employment prior to the end of an employment contract, the employee shall be entitled only to the prorated salary and benefits earned through the last date of actual service.

V. INTERNAL COMPLAINT REVIEW

Complaints regarding allegations of harassment or discrimination should be made pursuant to the specific policies addressing those issues. The purpose of this “Internal Complaint Review Policy” is to afford all employees of the School the opportunity to seek internal resolution of their work-related concerns. All employees have free access to their immediate supervisors or to other School Administration of their choice to informally express their work-related concerns.

All effort should be made to handle situations between the specific people involved. If there is a personal issue between two employees the employees should address the situation at that level first. The following procedure should be followed only if the situation cannot be resolved at the primary level.

A. Filing of Complaint

If complaints cannot be resolved informally, employees may file a written complaint with the Administrative Director (or RMCS governing board president) as soon as possible after the events that give rise to the employee’s work-related concerns. The written complaint should set forth in detail the basis for the employee’s complaint.

B. Investigation

An objective and timely investigation of all complaints, which cannot be resolved informally, will be undertaken. This includes meeting separately with the employee and with others who either are named in the complaint or who may have knowledge of the facts set forth in the complaint.

The School will attempt to treat all internal complaints and their investigation as confidential, recognizing, however, that in the course of investigating and resolving internal complaints some dissemination of information to others may be necessary or appropriate.

Upon completion of the investigation, the Administrative Director or RMCS Board President shall report the finding(s) to the employee in writing.

C. Non-Retaliation

If an employee has filed a complaint in good faith, the employee will not be disciplined or otherwise penalized for lodging the complaint. If an employee believes that he or she is being retaliated against for lodging a complaint, the employee should immediately notify the Administrative Director, or RMCS Board President.

VI. Operation Procedures**A. Student Attendance**

Teachers should take attendance each morning at 8:30 am and then again at 9:00 am. Although we try to involve students in the procedures of the classroom, **students should never write on or be responsible for** the formal attendance that is turned in to the office.

1. Attendance must be written in pen (preferably blue ink).
2. Do not use “white out” to make corrections. Simply draw a line through the mistake, make the correction and initial beside the space.
3. Please make sure that attendance is sent to the office **no earlier than 9:00 am and no later than 10:00 am each day.**
4. In addition to the attendance sheets turned into the office, **each class must have a record of student attendance which is kept in the classroom.**
5. Students should be marked tardy if they arrive after 8:30 am. **No student may be admitted into the classroom after 8:30 am without a tardy slip from the office.**

B. Student Discipline

Before a child is sent to the office for non-emergency infractions, there should be evidence that other solutions have been attempted.

Each student arriving in the office should have with them a referral form from their classroom teacher. See Appendix for form. Please keep a supply of blank forms in your classroom.

1. Behaviors that warrant immediate removal from the classroom to the office:
 - a. Fighting or purposely harming another individual.
 - b. Possessing any pharmaceutical item or paraphernalia.
 - c. Cruelty to any classroom animal.
 - d. Possession of dangerous items such as but not restricted to: guns, bullets, matches, knives, razors.
 - e. Verbal disrespect of an adult in the classroom.
2. Procedure for other classroom disruptions or behaviors:
 - a. 1st Warning
 - b. 2nd Removal from activity/time out
 - c. 3rd Phone calls to parent. (The 1st 3 steps may all occur in the same day.)
 - d. 4th If the behavior does not stop as a result of the first three consequences, the student should be sent to the office and removed from the classroom. A notice will be sent to the parent that the child was removed from the classroom.

3. Purposeful disrespect to other students or adult:
 - a. Removal from classroom situation
 - b. If this occurs between students, teacher will mediate at the peace table with the students.
 - c. If this occurs between student and the teacher, student will be brought to the office and the administrator will mediate the situation.
 - d. If a student is repeatedly disrespectful, the teacher must notify the parents in order to begin the process of working on the issue.

C. Six-Week Report

At the end of every six-week attendance period, a report is to be given to the administrator with the names of any children who are showing signs of academic struggle. This report should also include the names of students about whom you have other concerns.

D. Absences

If you know that you will need a day off for a doctor's appointment, etc., please schedule this time as far in advance as possible. There should be a minimum of one week's notice for scheduled days off.

1. It is the teacher's responsibility to fill out a "Request for Absence" form. This form should include the name of the substitute you have confirmed for the day.
2. It is the teacher's responsibility to arrange for a substitute for this time.

If you need to be out due to illness, call the administrator with as much notice as possible, no later than 7:00 am on the day of the absence. Please attempt to arrange for a sub before you contact the administrator.

E. Report for Monthly Planning

Staff is expected to attend all staff meetings and grade level planning meetings.

Monthly planning reports will be turned in by each class team on the last week of the month preceding the month the lessons will be presented (i.e., for October, the plan would be due the last week of September).

F. Field Trips / Class Events / Guests in the Classroom

All field trips, class events, etc., must be approved through the office and planned at least one month in advance of taking the trip.

1. Field trips should be included in the monthly lesson plan.
2. There should be a curriculum connection between the trip and the classroom.

3. Grade levels should be planning field trips together. Understandably, classes may not always be able to take trips on the same day, but all students in a grade should have an opportunity to experience the same trips.

G. Responsibility for Information

Each staff member is responsible for retaining all information presented at each staff meeting and in any daily memos.

1. Daily memos are kept on file and may be copied for each staff member's own records. There will be a staff meeting binder kept in the administrator's office which will have a record of all documents handed out.

H. Sign IN/OUT

All staff **must** sign in when they arrive in the morning and sign out when leaving campus. This includes signing out and in when leaving campus for lunch break.

Sign out sheet will be placed in Teachers' Lounge.

I. Use of Kitchen Facility

Teachers may arrange to use the kitchen facility. This should be done on the Monthly Lesson Report and also placed on the main calendar by the teacher. No more than 4 students should accompany teacher at any time.

J. Use of TV/VCR

In addition to placing a request through the monthly planning report, teachers are responsible for placing equipment request on main calendar in the office.

K. Classroom

1. Teachers are responsible for locking their classroom each day before they leave. Windows must be closed, including the ceiling windows. Thermostats should be set at 80° overnight in the summer/spring and no warmer than 60 degrees in the fall/ winter.
2. Teachers are responsible for the presentation of their classroom. We are working towards a group aesthetic for the cleanliness and display level of each room.
 - a. As a group, the staff at RMCS has decided to keep shelves for backpacks outside of the classroom. These shelves are to be completely empty each day. Once a week they should be dusted and cleaned. Nothing should be kept on top of these shelves for display outside of the classroom without the consent of the staff as a whole.
 - b. There should be no food left out in the classrooms overnight. There should be supplies in each classroom for the students to clean up any remains from snack, spills, etc.
 - c. Displays of children's work should be limited to one area of the classroom. Too many items can be a distraction to our children who have attention issues.

L. Staff Evaluations

1. Each month, the administrative director will do a walkthrough of each classroom. This process will take approximately 30 minutes and the classroom teachers will get a report based on this visit.
2. Twice a year, the administrative director will do a full evaluation of each teacher. This will be a collaborative process where the teacher is involved in helping to set goals and objectives.

M. Purchasing

Classrooms will receive a budget for the year.

1. Purchases under \$100
 - a. These purchases should be discussed between the co-teachers before a purchase is made. Teacher will then submit the receipts for reimbursement to the Administrative Director. Receipts should be taped to the back of the form found in the appendix of the handbook.
 - b. When requesting reimbursement for items under \$100, staff should expect turn-around time of up to three weeks.
2. ANY purchases that are over \$100
 - a. These purchases must be approved by the director PRIOR to purchase being made. This approval must be in writing and turned in with the receipt.
 - b. Requests for reimbursement for **over \$200** are sent through fiscal at the district. Although these requests are sent in on a weekly basis, the turn-around time on receiving the reimbursement check may vary.

N. Training Reimbursement

Each teacher is eligible for \$500/year for conferences and outside training. ALL training must be approved through the Administrative Director prior to registration if the teacher wants to be reimbursed.

O. Procedural Issues

Staff who are found in violation of any of the procedures set forth in this document will be given a written warning. A second violation of any of these procedures will put in to action the Employee Discipline Policy found in the Employee Handbook.

P. Grievance Procedure

(For purposes of this document grievances are defined as the following: physical harm/abuse; verbal abuse – foul language/disrespect; negligence – failure to follow through or resolve conflict. Also for the purposes of this document, this only relates to issues between staff members, between staff and parent, and between staff and Administration.)

1. Staff who feel they have been subjected to behaviors listed in the above definition, should first communicate that with the person they believe to have acted against them. This communication should be repeated at least once before an official grievance is filed- except in the case of physical harm/abuse.
2. If the problem is not resolved, a grievance form should be completed and turned in to the administrator. (If the grievance is between staff and administrator, the form should be completed and given to the President of the Board.)
 - a. At this point there will be mediation between the two parties. The administrator will serve as mediator between staff; President of Board will serve as mediator between staff and administrator.
3. If mediation cannot bring about resolution of the problem, in extreme cases the matter will be brought before the board in closed session.

Q. Teachers' Lounge

Each **classroom pair** will be responsible for cleaning the lounge on a weekly basis. This responsibility includes:

- Wiping down counter tops
- Wiping out the microwave
- Emptying out refrigerator on Friday afternoon
- Cleaning clutter left in lounge
- Taking home towels at the end of the week to wash

Each individual staff member is responsible for:

- Washing dishes immediately after use (not at the end of the day)
- Throwing scraps of paper away after using cutting board
- Returning cutlery to the proper place after washing,
- If you are eating in your room, please use plastic utensils

R. Copies

Copies should be made prior to the school day starting or during your break. Copies should be made by teacher or parent, not students. Books should not be copied as whole without notifying the Administrative Director.

S. Phone Calls

There should not be personal phone calls made during time with the students unless it is an emergency.

Phone messages will still be taken in the office unless the teacher has indicated a specific call should go through.

- Please notify office staff of incoming phone calls that need to be transferred to your room.

APPENDICES

APPENDIX D

Request for Absence Form

Name of teacher making request: _____

Name of person who has agreed to substitute for teacher: _____

Date of absence: _____ Time of absence: _____

Additional explanation: _____

Approved by: _____
Administrator's Signature

Date signed: _____

Request for Absence Form

Name of teacher making request: _____

Name of person who has agreed to substitute for teacher: _____

Date of absence: _____ Time of absence: _____

Additional explanation: _____

Approved by: _____
Administrator's Signature

Date signed: _____



LAW OFFICES OF SPECTOR, MIDDLETON, YOUNG & MINNEY, LLP

MARCH 25, 2009

PAUL C. MINNEY
JAMES E. YOUNG
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AMANDA J. MCKECHNIE

Carl Wong, Ed.D.
Superintendent of Schools
SONOMA COUNTY OFFICE OF EDUCATION
5340 Skylane Blvd.
Santa Rosa, CA 95403

VIA: HAND DELIVERY

Re: Liability Protection for Charter School Authorizers

JESSICA ADAMS ROBISON
TIMOTHY M. WEIR
JERRY W. SIMMONS
CHASTIN H. PIERMAN
JULIE D. ROBBINS
JAMES L. SHEA
KIMBERLY RODRIGUEZ
ANDREA C. SEXTON
SARAH J. KOLLMAN
JANELLE A. RULEY

Dear Dr. Wong:

This letter is submitted pursuant to County Board Policy 0420.4(a). The purpose of this letter is to describe the protection of a charter authorizer from the debts and obligations of one of its charter schools.

The first layer of protection is statutory. Education Code Section 47604(c) states as follows:

“An authority that grants a charter to a charter school to be operated by or as a nonprofit public benefit corporation is not liable for the debts or obligations of the charter school, or for claims arising from the performance of acts, errors, or omissions by the charter school, if the authority has complied with all oversight responsibilities required by law, including, but not limited to, those required by Section 47604.32 and subdivision (m) of Section 47605.”

As the River Montessori will be operated as a nonprofit public benefit corporation, the statutory protection granted under Education Code Section 47604(c) shall apply to protect its charter authorizer.

The second layer of protection is typically done through a Memorandum of Understanding (“MOU”) between the charter authorizer and the charter school. It is common for a charter school to provide for the indemnification and defense of its charter authorizer in the MOU, and it is also common for a charter school to name its charter authorizer as an additional insured on all insurance of the charter school. Further, the MOU provides a vehicle to document its compliance with its oversight obligations as provided by law.

TOM PERAIC, OF COUNSEL

Accordingly, the River Montessori can enter into an MOU with the County to provide additional assurances regarding protection from liability including the indemnification and defense of its charter authorizer and naming the charter authorizer as an additional insured.

It is worth noting that we are unaware of any instance where a charter authorizer has been held liable for the debts and obligations of a charter school. It is also worth noting that we are unaware of any instance where a school district, which has denied a charter which was ultimately approved by a county board of education, has been held liable for the debts and obligations of the charter school it originally denied.

Please feel free to give me a call if you should have any questions regarding this matter.

Sincerely,

LAW OFFICES OF SPECTOR,
MIDDLETON YOUNG & MINNEY, LLP


LISA A. CORR

BYLAWS
OF
River Montessori Charter School
(A California Nonprofit Public Benefit Corporation)

ARTICLE 1: NAME

The name of this corporation is River Montessori Charter School.

ARTICLE 2: PURPOSES

This corporation has been formed for charitable purposes, that is, to manage, operate, guide, direct and promote a charter school to educate children who are members of the general public of Sonoma County and surrounding communities, using Montessori methods. The means of providing such education includes, but is not limited to, maintaining facilities for instruction and developing educational programs and curricula. Also in the context of these purposes, the Corporation shall not, except to an insubstantial degree, engage in any other activities or exercise of power that do not further the purposes of the Corporation.

The Corporation shall not carry on any other activities not permitted to be carried on by: (a) a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code; or (b) a corporation, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code. No substantial part of the activities of the Corporation shall consist of the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, or intervene in (including the publishing or distributing of statements) any political campaign on behalf of or in opposition to any candidate for public office.

ARTICLE 3: PRINCIPAL OFFICE

The principal office for the transaction of the activities and affairs of the corporation shall be located in the City of Petaluma, County of Sonoma, State of California. The Board of Directors may at any time, or from time to time, change the location of the principal office from one location to another within said county, taking into consideration provisions of the California Education Code related to the location of charter schools. The Board of Directors may at any time establish branch offices at any place where the corporation is qualified to do business. Any such change of location must be noted by the Secretary on these bylaws opposite this Section; alternatively, this Section may be amended to state the new location.

ARTICLE 4: DEDICATION OF ASSETS

The properties and assets of this nonprofit corporation are irrevocably dedicated to charitable purposes. No part of the net earnings, properties, or assets of this corporation, on dissolution or otherwise, shall inure to the benefit of any private person or individual, or any member, director or officer of this corporation. On liquidation or dissolution, all properties and assets remaining after payment, or provision for payment, of all debts and liabilities of the corporation shall be distributed and paid over to a public school, such as a charter school that is organized and operated exclusively for charitable purposes and that has established its tax-exempt status under Section 501(c)(3) of the Internal Revenue Code.

ARTICLE 5: MEMBERSHIP

The corporation shall not have any members within the meaning of Section 5056 of the California Corporations Code. The corporation may from time to time use the term "members" to refer to persons associated with it, but such persons shall not be members within the meaning of Section 5056 of the California Corporations Code.

ARTICLE 6: BOARD OF DIRECTORS

Section 1. Powers. Subject to the provisions and limitations of the California Nonprofit Public Benefit Corporation Law and any other applicable laws, and subject to any limitations of the Articles of Incorporation or bylaws, the business and affairs of the corporation shall be managed, and all corporate powers shall be exercised, by or under the direction of the Board of Directors. The Board of Directors may delegate its duties to an officer or employee of River Montessori Charter School, with the exception of expenditures over \$5,000; budget approval or revision; personnel matters; or approval of financial reports, provided that the activities and affairs of the corporation shall be managed and all corporate powers shall be exercised under the ultimate direction of the Board of Directors and consistent with the approved charter.

Without prejudice to the general powers, but subject to the same limitations, the Board of Directors shall have the power to:

- a. Appoint and remove, at the pleasure of the Board of Directors, all corporate officers, agents, and employees; prescribe powers and duties for them as are consistent with the law, the articles of incorporation, and these bylaws; fix their compensation; and require from them security for faithful service.
- b. Change the principal office or the principal business office in California from one location to another; cause the corporation to be qualified to conduct its activities in any other state, territory, dependency, or country; conduct its activities in or outside California; and designate a place in California for holding any meeting of members.
- c. Borrow money and incur indebtedness on the corporation's behalf and cause to be executed and delivered for the corporation's purposes, in the corporate name, promissory notes, bonds, debentures, deeds of trust, mortgages, pledges, hypothecations, and other evidences of debt and securities.
- d. Adopt and use a corporate seal; prescribe the forms of membership certificates; and alter the forms of the seal and certificates.

Section 2. The authorized number of directors of the corporation shall not be less than three (3) nor more than nine (9), until changed by amendment of the Articles of Incorporation or these bylaws. The authorized number of Founding Board Directors, in the initial stage, prior to the opening of the school, shall be four (4). The authorized number of directors, following the opening of the school and the initial Annual Meeting, shall be seven (7).

Section 3. Election, Designation, and Term of Office of Directors. The initial Board of Directors shall be chosen by the incorporators to serve until their successors have been elected in the manner described below and seated at the first annual meeting of the directors. The initial directors may continue to serve as directors, if they otherwise qualify. The Board of Directors, representing various constituencies of the charter school, shall be elected or selected in the following manner.

- A. Three directors shall be parents of students at the school and shall be elected by the parents. Parents, for the purpose of this section, shall include parents or guardians of students enrolled in the school or, during the first full school year only, parents who signed the letter of support in favor of the formation of the school prior to the incorporation of this corporation. The Board of Directors may amend the bylaws to reset the exact number of parent directors from time to time, but only with prior approval from the chartering agency. For each vacant position, each student shall have two votes that are allocated to his or her parents, as they see fit.

The Board of Directors, or its designee, such as a parent-teacher leadership group, shall hold an informational meeting in the spring of the school year to encourage parents to become candidates to the Board and to describe the roles and responsibilities of the Board. This informational meeting may have other purposes as well and shall be repeated in the first month of the next school year.

At least one month prior to the Annual Meeting, an informational letter shall be mailed or delivered to all parents describing the duties and responsibilities of the Board of Directors and inviting them to become a candidate. At the same time, public notice both inside and outside the school, shall announce the opening(s) for parent director. Three weeks prior to the Annual Meeting, candidates should inform the President or Secretary of the Board that they are a candidate. The Secretary or their designee shall prepare a ballot that is provided to each family, or to each parent, if not living in the same household, who may vote once for each vacant parent director position. Any two parents of one student may decide to each cast one ballot. If only one parent of a student is voting, each position on their ballot is worth two votes. Parents may vote for write-in candidates.

Ballots shall be collected, for at least one week, in a secure box, or similar structure, in the corporation's principal office. At the discretion of the directors, ballots may be cast at a meeting or assembly of parents, at least one week prior to the Annual Meeting. Ballots shall be counted at the end of the day one week prior to the Annual Meeting by both the President and Secretary of the Board. Parents may be present to observe the counting. After the ballots are counted, the election results will be posted at the school office the following school day.

Parents shall serve a term of three years. At the first annual meeting, the parent

directors shall be divided into three groups and be designated to serve one (1), two (2), or three (3) year terms by a random method determined by the Board of Directors. Thereafter, the term of office of each parent director shall be three (3) years.

A parent director of the Board whose child had been enrolled at the school, but whose child is no longer enrolled, may serve for no more than three months in that capacity following their child's leaving, although they may be elected to serve as a Community Representative director. If a parent resigns from the Board more than six (6) months prior to the next Annual Meeting, the Board of Directors shall elect a new parent director to the Board. If a parent resigns from the Board less than six (6) months prior to the next Annual Meeting, the Board of Directors may elect a new parent director to the Board or the position may remain vacant until the next Annual Meeting.

- B. One director may be a representative of the authorizing agency, at the discretion of the authorizing agency. This director may be voting or non-voting, based on the preference of the authorizing agency, as expressed in the initial Memorandum of Understanding between the School and the authorizing agency.
- C. Three or four directors shall be independent community representatives, elected by the Directors. In the event that the authorizing agency chooses to appoint a Director, there shall be three independent community representatives. In the event that the authorizing agency chooses not to appoint a Director, there shall be four independent community representatives. For purposes of this paragraph, independent community representatives include any member of the public who is not employed by the corporation or have a family member enrolled at the school. Ideally, these directors should be trained in or very familiar with the Montessori educational model. Ideally they may also have other knowledge and experience necessary for the operations or oversight of a school or nonprofit social venture and reflect the diversity of the community.

At least one month prior to the Annual Meeting or other scheduled Board election, public notice both inside and outside the school, shall announce the opening for community representative director(s). Any interested member of the public may submit their candidacy to the Executive Director or Secretary at any time prior to the election. After any other new members of the Board of Directors have been seated, the Board of Directors shall elect the community representative(s) to the Board.

Community representative directors shall serve a term of two years. At the first annual meeting, the community representative directors shall be designated to serve one (1) or two (2) year terms by a random method determined by the Board of Directors. Thereafter, the term of office of each director shall be two (2) years.

If a community representative resigns from the Board more than six (6) months prior to the next Annual Meeting, the Board of Directors shall elect a new community representative director to the Board. If a community representative resigns from the Board less than six (6) months prior to the next Annual Meeting, the Board of Directors may elect a new community representative director or the position may remain vacant until the next Annual Meeting.

- D. For educational purposes, students may be allowed to observe and participate in Board Meetings or students may be allowed to elect a non-voting member to the Board of Directors.

Each director, including a director elected to fill a vacancy, shall hold office until expiration of the term for which elected and until a successor has been elected and qualified. Directors may serve any number of consecutive terms.

The corporation intends that the Board of Directors shall collectively represent a diversity of relevant backgrounds and skills to enable the Board of Directors to make informed, well-balanced decisions on the economic viability and social impact of corporate activities.

Section 4. Vacancies. A vacancy on the Board shall exist on the occurrence of the following: (a) the death, resignation, or removal of any director; (b) the declaration by resolution of the Board of a vacancy in the office of a director who has been declared of unsound mind by a final order of court, convicted of a felony, or found by final order or judgment of any court to have breached a duty under Sections 5230-5239 of the Law dealing with standards of conduct for a director, or has missed three (3) consecutive meetings of the Board of Directors or a total of four (4) meetings of the Board during any one calendar year, without a valid excuse; (c) an increase in the authorized number of directors; or (d) the failure of the directors, at any annual or other meeting of directors at which any director or directors are to be elected, to elect the full authorized number of directors.

The Board of Directors, by affirmative vote of a majority of the directors then in office, may remove any director without cause at any regular or special meeting; provided that notice of that meeting and of the removal questions are given in compliance with the provisions of the Ralph M. Brown Act. (Chapter 9 (commencing with Section 54950) of Division 2 of Title 5 of the Government Code). If the director is the representative of the chartering district, the Board of Directors may only remove this director with the written consent of the chartering district and may request that the chartering district appoint a different representative.

Except as provided in this paragraph, any director may resign effective upon giving written notice to the chairperson of the Board, the president, the secretary, or the Board of Directors, unless the notice specifies a later time for the effectiveness of the resignation. If the resignation is effective at a future time, a successor may be elected to take office when the resignation becomes effective. Unless the California Attorney General is first notified, no director may resign when the corporation would then be left without a duly elected director in charge of its affairs.

With the exception of the potential representative of the chartering district, vacancies on the Board may be filled in the manner described in Section 3 of this Article or, if by Board election, by vote of a majority of the directors then in office or if the number of directors then in office is less than a quorum, by (a) the unanimous consent of the directors then in office, (b) the affirmative vote of a majority of the directors then in office at a meeting held according to notice or waivers of notice complying with Corporations Code Section 5211., or (c) by vote of a sole remaining director. No reduction of the authorized number of directors shall have the effect of removing any director before that director's term of office expires.

Section 5. Meetings.

Meetings shall be held at the principal office of the Corporation. The Board of Directors may designate that a meeting be held at any place within California that has been designated by resolution of the Board of Directors or in the notice of the meeting. All meetings of the Board of Directors and its committees shall be called, held and conducted in accordance with the terms and provisions of the Ralph M. Brown Act, California Government Code Sections 54950, et seq., as said chapter may be modified by subsequent legislation.

The Board of Directors shall hold an annual meeting in October of each year for the purposes of a) seating the director(s) to be elected by the parents and by the educational staff; b) electing the community-representative directors; c) electing officers of the corporation; and d) the transaction of other business as noted on the agenda. This meeting shall be held at a time, date, and place as may be specified and noticed by resolution of the Board of Directors. Generally, the Board of Directors will meet monthly at such times as are fixed by the Board of Directors. Regular meetings of the Board of Directors, including annual meetings, shall be held at such times and places as may from time to time be fixed by the Board of Directors.

At least 72 hours before a regular Meeting, the Board, or its designee, shall post an agenda containing a brief general description of each item of business to be transacted or discussed at the Meeting, including items to be discussed in closed session.

Members of the Board of Directors may participate in teleconference meetings so long as all of the following requirements in the Brown Act are complied with:

- a. At a minimum, a quorum of the members of the Board of Directors shall participate in the teleconference meeting from locations within the boundaries of the school district in which the Charter School operates;
- b. All votes taken during a teleconference meeting shall be by roll call;
- c. If the Board of Directors elects to use teleconferencing, it shall post agendas at all teleconference locations with each teleconference location being identified in the notice and agenda of the meeting;
- d. All locations where a member of the Board of Directors participates in a meeting via teleconference must be fully accessible to members of the public and shall be listed on the agenda;¹
- e. Members of the public must be able to hear what is said during the meeting and shall be provided with an opportunity to address the Board of Directors directly at each teleconference location; and
- f. The agenda shall indicate that members of the public attending a meeting conducted via teleconference need not give their name when entering the conference call.²

Special meetings of the Board of Directors for any purpose may be called at any time by the Chairman of the Board of Directors, if there is such an officer, or the President, or the Secretary, or any two directors. The party calling a special meeting shall determine the place, date, and time thereof.

In accordance with the Brown Act, special meetings of the Board of Directors may be held only after twenty-four (24) hours notice is given to each director and to the public through the posting of an agenda. Pursuant to the Brown Act, the Board of Directors shall adhere to the following notice requirements for special meetings:

- a. Any such notice shall be addressed or delivered to each director at the director's address as it is shown on the records of the Corporation, or as may have been given to the Corporation by the director for purposes of notice, or, if an address is

¹ This means that members of the Board of Directors who choose to utilize their homes or offices as teleconference locations must open these locations to the public and accommodate any members of the public who wish to attend the meeting at that location.

² The Brown Act prohibits requiring members of the public to provide their names as a condition of attendance at the meeting.

- not shown on the Corporation's records or is not readily ascertainable, at the place at which the meetings of the Board of Directors are regularly held.
- b. Notice by mail shall be deemed received at the time a properly addressed written notice is deposited in the United States mail, postage prepaid. Any other written notice shall be deemed received at the time it is personally delivered to the recipient or is delivered to a common carrier for transmission, or is actually transmitted by the person giving the notice by electronic means to the recipient. Oral notice shall be deemed received at the time it is communicated, in person or by telephone or wireless, to the recipient or to a person at the office of the recipient whom the person giving the notice has reason to believe will promptly communicate it to the receiver.
 - c. The notice of special meeting shall state the time of the meeting, and the place if the place is other than the principal office of the Corporation, and the general nature of the business proposed to be transacted at the meeting. No business, other than the business the general nature of which was set forth in the notice of the meeting, may be transacted at a special meeting.

Adjourned Meeting and Notice. A majority of the directors present, whether or not a quorum is present, may adjourn any meeting to another time and place. If the meeting is adjourned for more than twenty-four (24) hours, notice of any adjournment to another time or place shall be given prior to the time scheduled for the continuation of the meeting to the directors who were not present at the time of the adjournment, and to the public in the manner prescribed by any applicable public open meeting law.

Section 6. Action at a Meeting. A majority of the directors then in office shall constitute a quorum. Every act done or decision made by a majority of the directors present at a meeting duly held at which a quorum is present shall be regarded as the act of the Board of Directors, unless a greater number, or the same number after disqualifying one or more directors from voting, is required by the Articles of Incorporation, these bylaws, or the California Nonprofit Public Benefit Corporation Law. Directors may not vote by proxy. A meeting at which a quorum is initially present may continue to transact business notwithstanding the withdrawal of enough directors to leave less than a quorum, if any action taken (other than adjournment) is approved by at least a majority of the directors required to constitute a quorum.

Section 7. Fees and Compensation. Directors and members of committees may not receive any compensation for their services as such, but may receive reimbursement of expenses incurred in the performance of their duties, as the Board of Directors may establish by resolution to be just and reasonable as to the corporation at the time that the resolution is adopted.

Section 8. Non-Liability of Directors. No director shall be personally liable for the debts, liabilities, or other obligations of this corporation.

Section 9. Compliance with Laws Governing Student Records. The Charter School and the Board of Directors shall comply with all applicable provisions of the Family Education Rights Privacy Act ("FERPA") as set forth in Title 20 of the United States Code Section 1232g and attendant regulations as they may be amended from time to time.

Section 10. Compliance with Conflicts of Interest Laws. The Charter School and the Board shall comply with applicable conflict of interest laws, including the Political Reform Act and California Government Code Section 1090, et seq. ("Government Code Section 1090"), as said chapter may be modified by subsequent legislation.

ARTICLE 7: STANDARD OF CARE

Section 1. General. A director shall perform the duties of a director, including duties as a member of any committee of the Board on which the director may serve, in good faith, in a manner such director believes to be in the best interest of this corporation and with such care, including reasonable inquiry, as an ordinarily prudent person in a like situation would use under similar circumstances.

In performing the duties of a director, a director shall be entitled to rely on information, opinions, reports or statements, including financial statements and other financial data, in each case prepared or presented by:

- (a) One or more officers or employees of the corporation whom the director believes to be reliable and competent in the matters presented;
- (b) Counsel, independent accountants or other persons as to matters which the director believes to be within such person's professional or expert competence; or
- (c) A committee of the Board upon which the director does not serve, as to matters within its designated authority, which committee the director believes to merit confidence, so long as in any such case, the director acts in good faith, after reasonable inquiry when the need therefore is indicated by the circumstances and without knowledge that would cause such reliance to be unwarranted.

Section 2. Loans. This corporation shall not make any loan of money or property to, or guarantee the obligation of, any director or officer, unless approved by the California Attorney General; provided, however, that this corporation may advance money to a director or officer of this corporation for expenses reasonably anticipated to be incurred in performance of the duties of such officer or director so long as such individual would be entitled to be reimbursed for such expenses absent that advance.

Section 3. Restriction on Interested Directors. No interested persons may serve on the Board of Directors. An interested person is (a) any person compensated by the corporation for services rendered to it within the previous 12 months, whether as a full-time or part-time employee, independent contractor, or otherwise, excluding any reasonable compensation paid to a director as director; and (b) any brother, sister, ancestor, descendant, spouse, brother-in-law, sister-in-law, son-in-law, daughter-in-law, mother-in-law, or father-in-law of such person.

Section 4. Indemnification. To the fullest extent permitted by law, this corporation shall indemnify its "agents", as described in Section 5238(a) of the Corporations Code, including its directors, officers, employees, and volunteers, and including persons formerly occupying any such position, and their heirs, executors, and administrators, against all expenses, judgments, fines, settlements, and other amounts actually and reasonably incurred by them in connection with any "proceeding," as that term is used in said Section 5238(a), and including an action by or in the right of the corporation, by reason of the fact that the person is or was a person described in that Section. "Expenses" shall have the same meaning as in said Section. Such right of indemnification shall not be deemed exclusive of any other rights to which such persons may be entitled apart from this Article 7, Section 4.

On written request to the Board of Directors by any person seeking indemnification under Corporations Code Section 5238 (b) or Section 5238 (c) the Board of Directors shall promptly decide under Corporations Code Section 5238 (e) whether the applicable standard of conduct set forth in Corporations Code Section 5238 (b) or Section 5238 (c) has been met and, if so, the Board of Directors shall authorize indemnification.

The corporation shall have power to purchase and maintain insurance to the fullest extent permitted by law on behalf of any agent of the corporation, against any liability asserted against or incurred by the agent in such capacity or arising out of the agent's status as such

ARTICLE 8: COMMITTEES

Section 1. Committees of Directors. The Board of Directors may, by resolution adopted by a majority of the directors then in office, provided that a quorum is present, designate one or more committees to exercise all or a portion of the authority of the Board, to the extent of the powers specifically delegated in the resolution of the Board or in these bylaws. Each such committee shall consist of two or more voting directors, and no one who is not a director, to serve at the pleasure of the Board. The Board may designate one or more alternate members of any committee, who may replace any absent member at any meeting of the committee. The appointment of members or alternate members of a committee requires the vote of a majority of the directors then in office, provided that a quorum is present. The Board of Directors may also designate one or more advisory committees that do not have the authority of the Board. However, no committee, regardless of Board resolution, may:

- (a) Take any final action on any matter that, under the California Nonprofit Public Benefit Corporation Law, also requires approval of the members or approval of a majority of all members;
- (b) Fill vacancies on the Board of Directors or any committee of the Board;
- (c) Fix compensation of the directors for serving on the Board or on any committee;
- (d) Amend or repeal the Articles of Incorporation or bylaws or adopt new bylaws;
- (e) Amend or repeal any resolution of the Board of Directors that by its express terms is not so amendable or repealable;
- (f) Create any other committees of the Board of Directors or appoint the members of committees of the Board;
- (g) Expend corporate funds to support a nominee for director if more people have been nominated for director than can be elected; or
- (h) Approve any contract or transaction to which the corporation is a party and in which one or more of its directors has a material financial interest.

Section 2. Meetings and Actions of Committees. Meetings and actions of all committees shall be governed by, and held and taken in accordance with, the provisions of these bylaws, concerning meetings and actions of directors, and the Brown Act, if applicable, with such changes in the context of those bylaws as are necessary to substitute the committee and its members for the Board of Directors and its members, except that the time for regular meetings of such committees and the calling of special meetings of such committees may be determined either by resolution of the Board of Directors or if none, by resolution of the committee. Minutes shall be kept of each meeting of any committee and shall be filed with the corporate records. The Board of Directors may adopt rules not inconsistent with the provisions of these bylaws for the government of any committee.

Section 3. Executive Committee. Pursuant to Article, Section 1, the Board may appoint an Executive Committee composed of three (3) or more directors, one of whom shall be the

chairperson of the, to serve as the Executive Committee of the Board. The Executive Committee, unless limited in a resolution of the Board, shall have and may exercise all the authority of the Board in the management of the business and affairs of the corporation between meetings of the Board; provided, however, that the Executive Committee shall not have the authority of the Board in reference to those matters enumerated in Article 6, Section 1. The secretary of the corporation shall send to each director a summary report of the business conducted at any meeting of the Executive Committee as well as any other documentation required by the provisions of Article 6.

Section 4. Audit Committee. The Board may appoint an Audit Committee. Notwithstanding Article 9, Section 1, which shall otherwise govern the committee's operations, the committee may be comprised of one or more directors. The membership of the Audit Committee shall not include the following persons;

- (a) The chairperson of the Board;
- (b) The treasurer of the corporation;
- (c) Any employee of the corporation; or
- (d) Any person with a material financial interest in any entity doing business with the corporation.

In the event that the Board appoints a Finance Committee, members of the Finance Committee must constitute less than one-half of the membership of the Audit Committee and the Chair of the Finance Committee shall not serve on the Audit Committee.

The Audit Committee shall make recommendations to the Board of Directors regarding the hiring and termination of an auditor, who shall be an independent certified public accountant, and may be authorized by the Board to negotiate the auditor's salary.

The Audit Committee shall confer with the auditor to satisfy its members that the corporation's financial affairs are in order, and shall review and determine whether to accept the audit.

In the event that the auditor's firm provides non-audit services to the corporation, the Audit Committee shall ensure that the auditor's firm adheres to the standards for auditor independence set forth in the latest revision of the Government Auditing Standards published by the Comptroller General of the United States, or any standards promulgated by the Attorney General of California.

ARTICLE 9: OFFICERS

Section 1. Officers. The officers of the corporation shall consist of a chairperson, vice chairperson, secretary, and chief financial officer, hereinafter referred to as "treasurer", and such other officers, such as president, hereinafter referred to as "executive director", as the Board may designate by resolution. The same person may hold any number of offices, except that neither the secretary nor the treasurer may serve concurrently as the chairperson of the Board or the president. In addition to the duties specified in this Article 9, officers shall perform all other duties customarily incident to their office and such other duties as may be required by law, by the Articles of Incorporation, or by these bylaws, subject to control of the Board of Directors, and shall perform such additional duties as the Board of Directors shall from time to time assign. The officers in addition to the corporate duties set forth in this Article 9 shall also have administrative duties as set forth in any applicable contract for employment or job specification.

The officers shall be chosen by the Board at its annual meeting, and shall serve at the pleasure of the Board, subject to the rights, if any, of any officer under any contract of employment. Without prejudice to any rights of an officer under any contract of employment, any officer may be removed with or without cause by the Board. Any officer may resign at any time by giving written notice to the Board of Directors, the chairperson of the Board, the president, or the secretary of the corporation, without prejudice, however, to the rights, if any, of the corporation under any contract to which such officer is a party. Any resignation shall take effect on the date of the receipt of such notice or at any later time specified in the resignation; and, unless otherwise specified in the resignation, the acceptance of the resignation shall not be necessary to make it effective. A vacancy in any office because of death, resignation, removal, disqualification, or any other cause shall be filled in the manner prescribed in these bylaws for regular appointments to that office. The compensation, if any, of the officers shall be fixed or determined by resolution of the Board of Directors.

Section 2. Chairperson of the Board. The chairperson of the Board shall, when present, preside at all meetings of the Board of Directors and Executive Committee. The chairperson is authorized to execute in the name of the corporation all contracts and other documents authorized either generally or specifically by the Board to be executed by the corporation, except when by law the signature of the president (or executive director) is required.

Section 3. Vice Chairperson of the Board. The vice chairperson shall, in the absence of the chairperson, or in the event of his or her inability or refusal to act, perform all the duties of the chairperson, and when so acting shall have all the powers of, and be subject to all the restrictions on, the chairperson.

Section 4. Executive Director. Subject to the control, advice and consent of the Board of Directors, the Board of Directors may appoint or hire an executive director who shall, in general, supervise and conduct the activities and operations of the corporation, shall keep the Board of Directors fully informed and shall freely consult with them concerning the activities of the corporation, and shall see that all orders and resolutions of the Board are carried into effect. Where appropriate, the Board of Directors shall place the executive director under a contract of employment. The executive director shall be empowered to act, speak for, or otherwise represent the corporation between meetings of the Board. The executive director shall be responsible for keeping the Board informed at all times of staff performance and for implementing any personnel policies adopted by the Board. The executive director is authorized to contract, receive, deposit, disburse, and account for funds of the corporation; to execute in the name of the corporation all contracts and other documents authorized either generally or specifically by the Board to be executed by the corporation; and to negotiate all material business transactions of the corporation. The executive director shall have such other powers and duties as the Board of Directors or the bylaws may require.

Section 5. Secretary. The Secretary shall keep or cause to be kept, at the corporation's principal office or such other place as the Board of Directors may direct, a book of minutes of all meetings, proceedings, and actions of the Board and of committees of the Board. The minutes of meetings shall include the time and place that the meeting was held; whether the meeting was annual, regular, special, or emergency and, if special or emergency, how authorized; the notice given; and the names of the directors present at Board of Directors and committee meetings.

The Secretary shall keep or cause to be kept, at the principal California office, a copy of the articles of incorporation and bylaws, as amended to date.

The Secretary shall give, or cause to be given, notice of all meetings of the Board and of committees of the Board of Directors that these bylaws require to be given. The Secretary shall keep the corporate seal, if any, in safe custody and shall have such other powers and perform such other duties as the Board of Directors or the bylaws may require.

Section 6. Treasurer. The treasurer shall keep and maintain, or cause to be kept and maintained, adequate and correct books and accounts of the properties and business transactions of the corporation, including accounts of its assets, liabilities, receipts, disbursements, gains, losses, capital, retained earnings, and other matters customarily included in financial statements. The Chief Financial Officer shall send or cause to be given to directors such financial statements and reports as are required to be given by law, by these bylaws, or by the Board. The books of account shall be open to inspection by any director at all reasonable times.

The treasurer shall deposit or cause to be deposited all moneys and other valuables in the name and to the credit of the corporation with such depositories as may be designated by the Board of Directors. The treasurer shall disburse or cause to be disbursed the funds of the corporation as may be ordered by the Board of Directors, and shall render to the chairperson, president and directors, whenever they request it, an account of all of the treasurer's transactions as treasurer and of the financial condition of the corporation. The treasurer shall have such other powers and perform such other duties as the Board, contract, job specification, or the bylaws may require.

If required by the Board of Directors, the treasurer shall give the corporation a bond in the amount and with the surety or sureties specified by the Board for faithful performance of the duties of the treasurer's office and for restoration to the corporation of all its books, papers, vouchers, money and other property of every kind in the treasurer's possession or under the treasurer's control on the treasurer's death, resignation, retirement, or removal from office.

ARTICLE 10: EXECUTION OF CORPORATE INSTRUMENTS

Section 1. Execution of Corporate Instruments. The Board of Directors may, in its discretion, determine the method and designate the signatory officer or officers or other person or persons, to execute any corporate instrument or document, or to sign the corporate name without limitation, except when otherwise provided by law, and such execution or signature shall be binding upon the corporation.

Unless otherwise specifically determined by the Board of Directors or otherwise required by law, formal contracts of the corporation, promissory notes, deeds of trust, mortgages, and other evidences of indebtedness of the corporation, and other corporate instruments or documents, memberships in other corporations, and certificates of shares of stock owned by the corporation, shall be executed, signed, or endorsed by the chairperson of the Board, vice chairperson of the Board or the president and by the secretary or treasurer or any assistant secretary or assistant treasurer.

All checks and drafts drawn on banks or other depositories on funds to the credit of the corporation, or in special accounts of the corporation, shall be signed by such person or persons as the Board of Directors shall authorize to do so.

Section 2. Loans and Contracts. No loans or advances shall be contracted on behalf of the corporation and no note or other evidence of indebtedness shall be issued in its name unless and except as the specific transaction is authorized by the Board of Directors. Without the

express and specific authorization of the Board, no officer or other agent of the corporation may enter into any contract or execute and deliver any instrument in the name of and on behalf of the corporation.

Section 3. Contracts with Members. The Corporation shall comply with Government Code Section 1090.

Section 4. Contracts with Non-Director Designated Employees. The Corporation shall not enter into a contract or transaction in which a non-director designated employee (e.g., officers and other key decision-making employees) directly or indirectly has a material financial interest unless all of the requirements in the River Montessori Charter School Conflict of Interest Policy have been fulfilled.

ARTICLE 11: RECORDS AND REPORTS

Section 1. Maintenance and Inspection of Articles and Bylaws. This corporation shall keep:

- a. Adequate and correct books and records of account;
- b. Written minutes of the proceedings of the Board and committees of the Board; and
- c. Such reports and records as required by law.

The corporation shall keep at its principal California office the original or a copy of its Articles of Incorporation and bylaws as amended to date, which shall be open to inspection by the directors at all reasonable times during office hours. If the corporation has no business office in California, the Secretary shall, on the written request of any director, furnish to that director a copy of the articles of incorporation and bylaws, as amended to the current date.

Section 2. Maintenance and Inspection of Federal Tax Exemption Application and Annual Information Returns. The corporation shall keep at its principal office a copy of its federal tax exemption application and its annual information returns for three years from their date of filing, which shall be open to public inspection and copying to the extent required by law.

Section 3. Maintenance and Inspection of Other Corporate Records. The corporation shall keep adequate and correct books and records of accounts, and written minutes of the proceedings of the Board and committees of the Board. All such records shall be kept at such place or places designated by the Board of Directors, or, in the absence of such designation, at the principal office of the corporation. The minutes shall be kept in written or typed form, and other books and records shall be kept either in written or typed form or in any other form capable of being converted into written, typed, or printed form. Upon leaving office, each officer, employee, or agent of the corporation shall turn over to his or her successor or the chairperson or president, in good order, such corporate monies, books, records, minutes, lists, documents, contracts or other property of the corporation as have been in the custody of such officer, employee, or agent during his or her term of office.

Every director shall have the right at any reasonable time to inspect the corporation's books, records, documents of every kind, physical properties, and the records of each subsidiary as permitted by California and federal law. The inspection may be made in person or by the

director's agent or attorney. The right of inspection includes the right to copy and make extracts of documents as permitted by California and federal law. This right to inspect may be circumscribed in instances where the right to inspect conflicts with California or federal law (e.g., restrictions on the release of educational records under FERPA) pertaining to access to books, records, and documents.

On written demand on the corporation, any director may inspect, copy, and make extracts of the accounting books and records and the minutes of the proceedings of the Board of Directors and committees of the Board of Directors at any reasonable time for a purpose reasonably related to the director's interest as a director. Any such inspection and copying may be made in person or by the director's agent or attorney. This right of inspection extends to the records of any subsidiary of the corporation.

Section 4. Preparation of Annual Financial Statements. As part of the annual report to all directors, or as a separate document if no annual report is issued, the corporation shall, within 120 days after the end of the corporation's fiscal year, annually prepare and mail or deliver to each director and furnish to each director a statement of any transaction or indemnification of the following kind:

a. Any transaction (i) in which the corporation, or its parent or subsidiary, was a party, (ii) in which an "interested person" had a direct or indirect material financial interest, and (iii) which involved more than \$50,000 or was one of several transactions with the same interested person involving, in the aggregate, more than \$50,000. For this purpose, an "interested person" is either:

(1) Any director or officer of the corporation, its parent, or subsidiary (but mere common directorship shall not be considered such an interest); or

(2) Any holder of more than 10 percent of the voting power of the corporation, its parent, or its subsidiary. The statement shall include a brief description of the transaction, the names of interested persons involved, their relationship to the corporation, the nature of their interest, provided that if the transaction was with a partnership in which the interested person is a partner, only the interest of the partnership need be stated.

Section 5. Reports. The Board shall cause an annual report to be sent to all directors, within 120 days after the end of the corporation's fiscal year, containing the following information:

- (a) The assets and liabilities, including the trust funds, of this corporation at the end of the fiscal year;
- (b) The principal changes in assets and liabilities, including trust funds, during the fiscal year;
- (c) The revenues or receipts of this corporation, both unrestricted and restricted for particular purposes, for the fiscal year;
- (d) The expenses or disbursements of this corporation for both general and restricted purposes during the fiscal year; and
- (e) Any information required under these bylaws; and

The report shall be accompanied by any pertinent report of independent accountants, or, if there is no such report, the certificate of an authorized officer of the corporation that such statements were prepared without audit from the books and records of the corporation.

ARTICLE 12: FISCAL YEAR

The fiscal year for this corporation shall begin on July 1 and shall end on June 30.

ARTICLE 13: AMENDMENTS AND REVISIONS

These bylaws may be adopted, amended or repealed by the vote of a majority of the directors present at a meeting duly held at which a quorum is present, except that no amendment shall change any provisions of the Charter that created the charter school or make any provisions of these bylaws inconsistent with that Charter, the corporations Articles of incorporation, or any laws. . If any provision of these bylaws requires the vote of a larger proportion of the Board than is otherwise required by law, that provision may not be altered, amended, or repealed except by that greater vote.

ARTICLE 14: CORPORATE SEAL

The Board of Directors may adopt, use, and alter a corporate seal. The seal shall be kept at the principal office of the corporation. Failure to affix the seal to any corporate instrument, however, shall not affect the validity of that instrument.

ARTICLE 15: CONSTRUCTION AND DEFINITIONS

Unless the context otherwise requires, the general provisions, rules of construction, and definitions contained in the California Nonprofit Corporation Law as amended from time to time shall govern the construction of these bylaws. Without limiting the generality of the foregoing, the masculine gender includes the feminine and neuter, the singular number includes the plural and the plural number includes the singular, and the term "person" includes a corporation as well as a natural person. If any competent court of law shall deem any portion of these bylaws invalid or inoperative, then so far as is reasonable and possible (i) the remainder of these bylaws shall be considered valid and operative, and (ii) effect shall be given to the intent manifested by the portion deemed invalid or inoperative.

CERTIFICATE OF SECRETARY

I, the undersigned, certify that I am the currently acting secretary of the River Montessori Charter School, a California nonprofit public benefit corporation, and the above bylaws, consisting of 15 pages, are the bylaws of this corporation as adopted by the Board of Directors on November 19, 2007, as amended on January 29, 2008, and on May 19, 2008, and that they have not been amended or modified since that date.

Executed on May 19, 2008, at Petaluma, California.

Danielle Oryn, Secretary



LAW OFFICES OF SPECTOR, MIDDLETON, YOUNG & MINNEY, LLP

DECEMBER 5, 2008

PAUL C. MINNEY
JAMES E. YOUNG
MICHAEL S. MIDDLETON
DANIEL I. SPECTOR
LISA A. CORR
AMANDA J. MCKECHNIE
TIMOTHY M. WEIR

Margaret M. Merchat, Interim General Counsel
School & College Legal Services of California
5350 Skylane Blvd.
Santa Rosa, CA 95403

Re: Initial Review of Charter School Appeal Packet

Dear Margaret,

As you know, our office represents the Petitioners for the River Montessori Charter School (“Charter School”). The Petitioners forwarded me a memorandum dated December 2, 2008, signed by David Wolf, Ph.D., Sonoma County Board of Education (“County”) President, which requested additional information in alignment with Sonoma County Board Policy. Please consider this letter a “supplemental writing” in response to the County request on behalf of the Petitioners.

1) Pursuant to Section A 2 of County Board Policy:

Please see Appendix A of the charter for a description of Founding Group Member Dana Wade who has an elementary and special education degree and who worked as a special education teacher in public schools in Palo Alto, CA and New Hampshire.

Also, please note that the following letter was included in the appeal packet from Susan Olson, Executive Director of Sebastopol Independent Charter School, a Local Education Agency (“LEA”) within the Sonoma County Special Education Local Plan Area (“SELPA”):

October 28, 2008

Dear Sonoma County Board of Education,

It would be my pleasure to serve as an advisor to the River Montessori Charter School in an administrative capacity as needed. As a charter school in Sonoma County that serves as its own LEA for special education, my Special Education Director and I could extend our expertise in this area to River Montessori. We are proud of our 14 year history and are happy to share this experience with other charter schools.

Sincerely yours,
Susan Olson
Susan Olson
Executive Director

JESSICA ADAMS ROBISON
JERRY W. SIMMONS
CHASTIN H. PIERMAN
JULIE D. ROBBINS
JAMES L. SHEA
KIMBERLY RODRIGUEZ
ANDREA C. SEXTON
SARAH J. KOLLMAN
JANELLE A. RULEY
AMY L. ROBERTS
ANDREW G. MINNEY
OF COUNSEL
SUZANNE A. TOLLEFSON

Additionally, in the list of consultants provided to the County as part of the appeals packet, a number of consultants will be utilized in assisting the Charter School with the provisions of special education services. Our office, Spector, Middleton, Young & Minney, will ensure appropriate training and legal compliance with regard to special education. We provide training to our clients in all areas of special education compliance, and we also guide charter schools to the appropriate resources for programmatic training, and services. Further, the Charter Schools Development Center also provides technical assistance, training and resources to charter school in the area of special education. Finally, consultant Barbara Waters Isetta, is a special education consultant and IEP coach for Sonoma County office of Education. She holds a multiple subject credential, a special education/learning handicap credential, RSP certificate and a CLAD certificate. Barbara has 15 years experience writing IEP's and taught in a learning handicap special day class for 10 years and was an RSP teacher for 5 years. Both Ms. Olson and Ms. Isetta have agreed to train and consult with the Charter School employees (special education and general education) to ensure a high-quality, legally compliant special education program at the Charter School.

Of course, the Charter School will also access SELPA training when made available.

2) Pursuant to Section A 10 of County Board Policy:

The Charter School's policy is to provide a systematic and comprehensive planning process for the development of facilities to meet the needs of the Charter School. The Charter School Board's obligation is to provide facilities of the kind and size that will best support and accommodate the Charter School's educational program for the projected enrollment.

It is the policy of the Charter School Board to provide facilities which offer safe, comfortable, accessible, efficient, and attractive spaces to accommodate and facilitate the organizational and instructional patterns that support the Charter School's educational philosophy and instructional goals in accordance with the charter.

It is the policy of the Charter School Board to provide for the systematic maintenance of major and critical building infrastructure components of the Charter School facility or facilities.

It is the policy of the Charter School Board to provide for the systematic renewal of Charter School facilities.

The Charter School facility or facilities will have:

1. Safe, effective and efficient mechanical systems, including electrical, plumbing, heating, ventilation, and air conditioning.
2. Sound structural elements including roof, doors, floors, walls, and windows.
3. Effective and efficient illumination.

4. Adequate classroom space for all students.
5. Adequate, safe, outdoor space for the physical education/recreation activities of the Charter School program.
6. Adequate supplementary space to support the programs required for instruction of the students required to attend the school, including space for itinerant staff and staff who provide special programs in addition to the regular instructional program and/or on a resource basis.
7. Infrastructure required to support instructional and administrative technology.
8. Full compliance with all Education Code Section 47610.
9. Full compliance with the access requirements specified in the Americans with Disabilities Act.

The Board shall annually review the facilities needs and student accommodation needs and consider the Executive Director/Principal's recommendations to address those needs.

When the Board deems necessary, the Board may obtain assistance in analyzing the Charter School's capital needs. Such assistance may be in the form of an appointed advisory group representing the full complement of community interests and/or hiring professional consultants, as the Board determines in its sole discretion.

The Executive Director/Principal shall present to the Board annually with recommendations regarding timing, location, costs and savings associated with site maintenance and renewal of existing school facilities. The report will:

1. Provide five-year enrollment projections prepared which have been reviewed and brought up-to-date annually
2. Provide an assessment of the Charter School facility related to building renewal, reconfiguration or expansion to meet educational program needs.
3. Identify interim and long-term options that address the identified needs.
4. Articulate a rationale for recommended solutions.
5. Provide a detailed scope of work (e.g. number of rooms, extend of building system improvements) for each recommended project.
6. Provide a cost estimate for each recommended project. This estimate will include all project costs (e.g. architect/engineering fees, project management, hazardous

material abatement, installation of technology infrastructure, contingency, equipment).

The Board shall review and approve all facilities related plans.

If in leased facilities, the Charter School will work with the building owner to ensure that regular maintenance is done on the building and outdoor site, to ensure safety and proper functioning of the educational program and related activities. If the lease includes a maintenance fee (triple net) then the Charter School will ensure that the owner provides for maintenance in a way that is consistent with the Charter School's educational program and Education Code Section 47610. If the Charter School is procuring maintenance directly, the Charter School will ensure that maintenance is performed to ensure safety and consistent functioning of the school consistent with the educational program and Education Code Section 47610.

The Charter School will adopt a regular inspection process with a building consultant familiar with the State Building Code and the local building enforcement agency.

3) Pursuant to Section A 11 of County Board Policy:

- a. The Petitioners hereby commit to the following statements:
 - i. All state and federal funds shall be maintained with the Sonoma County Treasury and not in private banks.
 - ii. Any foundation or other enterprise developed to support the charter school financially shall be subject to the same audit requirements as the charter school.
 - iii. All private bank accounts used by a foundation, corporation or the charter school are subject to public school records request and full disclosure to the county Board and County Superintendent.

4) Pursuant to Section A 13 of the County Board Policy:

- a. The Petitioners hereby commit to the following statement:

Workers compensation insurance and general liability insurance will be in place within ten calendar days of approval.

* * *

Please confirm that this meets the County's request and that all appeal timelines will continue to move forward from the date of this submission.

Margaret Merchat, Interim General Counsel
Re: Initial Review of Charter School Appeal Packet
December 5, 2008
Page 5 of 5

Thank you for your consideration. Please do not hesitate to call if you should have any questions regarding this matter.

Sincerely,
LAW OFFICES OF SPECTOR,
MIDDLETON, YOUNG & MINNEY, LLP



LISA A. CORR
ATTORNEY AT LAW



LAW OFFICES OF SPECTOR, MIDDLETON, YOUNG & MINNEY, LLP

DECEMBER 10, 2008

Margaret Merchat, Esq.
School and College Legal Services
5350 Skyland Boulevard
Santa Rosa, CA 95403

Via Email and U.S. Mail
mmerchat@sclscal.org

**Re: Supplemental Response to My Letter Dated December 5, 2008
River Montessori Charter School**

PAUL C. MINNEY
JAMES E. YOUNG
MICHAEL S. MIDDLETON
DANIEL I. SPECTOR
LISA A. CORR
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AMY L. ROBERTS
ANDREW G. MINNEY

OF COUNSEL
SUZANNE A. TOLLEFSON

Dear Margaret:

The Petitioners from the River Montessori Charter School (“Charter School”) have considered your question of the qualifications of the Administrator with regard to the Charter School when it operates as its own local educational agency within the SELPA. The Petitioners have agreed that as an LEA, the priority for public school experience and/or educational background and knowledge is increased. Therefore, they have agreed to clarify the qualification within the charter as to “administrative experience” to mean the following:

“The Executive Director/Principal shall have the following administrative experience:

- 1) at least two years of public administration experience, including participation in student Individualized Education Program meetings; or
- 2) at least two years of private school administration experience and demonstrate the appropriate knowledge of the responsibility of a Local Educational Agency under the IDEA and Section 504 of the Rehabilitation Act. Demonstration of knowledge shall be accomplished through a combination of the applicant’s educational background or certification and an interview with Petitioners and their special education consultants (Susan Olson and Barbara Waters Isetta).”

To the extent necessary to enhance the background of the Executive Director/Principal, the Petitioners are committed to utilizing Susan Olson and Barbara Waters Isetta and other consultants as necessary to provide additional training. The background and experience of Ms. Olson and Ms. Waters Isetta was discussed in our letter of December 5, 2008.

* * *

Margaret Merchat, Esq.
Re: Supplemental Response to My Letter Dated December 5, 2008
River Montessori Charter School
December 10, 2008
Page 2 of 2

Please feel free to contact me if you have further questions or concerns regarding this response.

Sincerely,

**LAW OFFICES OF SPECTOR,
MIDDLETON, YOUNG & MINNEY, LLP**



LISA A. CORR
ATTORNEY AT LAW

January 18, 2009

Dear Ad Hoc Committee of the Sonoma County Board of Education:

Thank you for the opportunity to respond to the questions posed in my absence during the meeting with the River Board. Following comprises our understanding of questions posed during that meeting and River's plans for meeting those concerns and most importantly, the needs of the students.

It is our utmost goal to have a positive working relationship with our authorizer, a relationship in which participants understand and support each other. It is in this spirit that I have attached some research, which may further answer some of your concerns about the successful compatibility of Montessori in public environments.

Should you have further questions or concerns, please let me know. We are glad to meet with you at any time to ensure your confidence our capabilities of serving the children of River Montessori Charter School.

Sincerely,

Kelly Griffith Mannion, M.Ed.
President, River Montessori Charter School Board

Committee Question #1:

Please clarify about River's interventions: How are the needs of the student diagnosed? When and where does tutoring take place? How is tutoring paid for, since there is presently no mention of it in the budget?

Teachers at River Montessori will diagnose the needs of each individual student consistently and perpetually in the classroom both anecdotally and formally. Teachers trained in child development, norms and benchmarks, multiple intelligences, the assessment and delivery of the materials and lessons, and California State Content Standards, observe each child daily for the achievement and success of the child's work as well as the child's understanding and consistent application of learned concepts. The individualized method of Montessori rather than teaching one lesson plan to 30 children simultaneously enables the Montessori teacher greater access to observing each individual child daily. Additional systems in place in the classroom beyond the cornerstone daily, individualized evaluations include programs such as Accelerated Reader, Albanesi Curriculum Program, and the Diagnostic Reading Assessment. These programs allow the teacher to 1) track each student through an individualized and tailored program with the use of a pre-test/assessment, which indicates what should be the content of the next lesson 2) deliver a lesson linked with concrete materials already aligned with State Content Standards and 3) assess for progress through a post-test. RMCS's curriculum committee will evaluate the processes and tests annually to review methodology and apparatus, correlation, and incorporate teacher feedback, in order to determine the most current and appropriate match for the students and school.

Diagnosis of the student will also be maintained through the use of a Student Study Team (SST) process. The SST is an economic, efficient, effective way to bring together all resources to support students who have difficulties and/or challenges in the classroom. Comprised of the student, teacher, parent, administration, and any related specialists it clarifies problems and concerns, develops strategies and organizes resources, provides a system for accountability, and serves to assist and counsel the classroom teacher. This system ensures that children are receiving the help they require to stay abreast of the State Standards because it is an early intervention support system addressing students' needs in all areas of development including curriculum. Although it is not a special education tool, per say, it serves to illuminate problems early and may provide initial data should special education be required for a student. For greater detail, please see the attached draft of policies, guidelines, and forms. Intervention in Montessori public charter schools has proven unique and successful as needs, with the exception of speech that could be provided in small group either in a resource room and/or library, are met through inclusion strategies with the classroom teacher through teacher/student material and/or peer-peer interaction and role modeling in the classroom. Hence, the plan of action on either of these accommodations is provided directly through the child's classroom work plan. Follow up from these "outsourced" specialists work with the student while also role-modeling these accommodations to the classroom so that normative development over time would be blended with peer-interaction and cross-age tutoring. Please see *Question 3* for related information.

Should the process indicate that the student requires tutoring, one-on-one time with the teacher is a keystone of the Montessori method and classroom as well as the inherent peer-teaching/learning. In addition to a resource specialist, experienced volunteers will provide over 30 hours per week of tutoring through qualified teachers and expert tutors. Please see *RCMS*

Volunteer Commitments 2009-2010, included with our charter. A resource specialist is referenced in the budget under special education.

Committee Question #2:

How are English Learners taught English?
--

Students are taught English through inclusion in the classroom as well as a formal language program such as Rosetta Stone, which has proven successful in California Montessori charter schools. The Montessori classroom is a dynamic and highly interactive environment that fosters an environment that respects and values linguistic and cultural diversity. Within this framework, materials are kinesthetic. Consequently, while a student is receiving direct instruction lessons in English, the student is simultaneously continuing through the tactile and visual lessons that cross the disciplines of core and supplementary subjects of the classroom. This provides a rich experience in language development and engenders progress and success in all areas of development and academic study.

It is also important to note that by definition, the Montessori environment engenders well-known principles and practices required to promote the acquisition of language and literacy. Students flourish when schools, families, and specialists partner, when teachers understand and incorporate cultural differences into language use within daily classroom practices and social and emotional interactions, when teachers engage in multiple literacy practices and offer a variety of written materials and meanings as well as the sounds of spoken language, and when students continue the use of a home language and are encouraged to experiment with the use, form, purpose, and intent of both first and second languages in order to further strengthen in the student the development of the second language.

Committee Question #3:

You talked a lot about summative assessments but not a lot about formative assessments. How are you determining whether a student has learned state standards, and how do your assessments tell you which he or she knows or does not know, and why don't they know, then what strategies will be used to address what he or she does not know and where and when will those strategies be delivered and at what cost (is it reflective in the budget)?

Terms differ in the education community but assuredly both formative and summative measures are integrated in the Montessori public environment. Naturally "formative", Montessori teachers are perpetually gauging student achievement through observation and record keeping. Formal practices of checking in and soliciting understanding of a lesson determines where the child stands in his learning and how next lessons should proceed. Pre-tests and post-tests, peer-, teacher-, and self-review assess learning more formally. Standardized testing (STAR) as well as other formal assessments further demonstrate the cumulative achievement of the student and provide a pattern of growth.

The framework of the charter, the lesson plans of the teacher and the work plans of the student parallel report cards, teacher records, observations, pre- and post-tests, progress reports and report cards, and parent conferences are all designed by state standards as well as Montessori benchmarks. These apparatus reflect achievement and understanding. Low-achieving students are assessed by a Student Study Team (SST) to determine why achievement or

understanding is not occurring. Please see the attached draft of SST policies and procedures to cover the numerous possibilities for low achievement and strategies. The SST process determines the best course of action and interventions to support the student based on individual needs whether they be addressed through enhanced classroom focus, experience, and/or support, tutoring, or a resource specialist (reflected in budget under Special Ed.) Please see *Question 1* for related information.

Committee Question #4:

More clarification as to Albanesi – what is it and what does it do?

The Albanesi Curriculum Program (ACP) is a complete Montessori curriculum with sequential exercises and individualized assessment tests specifically designed to integrate the Montessori curriculum with American traditional education, curriculums, and practices. These unique guiding materials can direct the students in their work with the didactic apparatus/manipulative materials (through task cards, and problems to solve, for example) while teachers coordinate lessons to the state standards and county adoptions. The program consists of applying five main steps: 1) pre-test to determine the strong and weak academic areas; 2) create a work plan based on the results of pre-test; 3) select a curriculum card based on the work plan; 4) teacher provides lesson, student practices and does independent work; 5) when work plan is completed (weekly) give a post-test.

The ACP has been in use in public and private Montessori schools with great success and feedback since 1986. According to their marketing materials, over 1,000 schools use the entire program while over 5,000 schools use their cards, charts and timeline/history materials.

Committee Question #5:

Is there anything in the petition that states that we will be in non-field act compliant buildings?

No, but in accordance with legal requirements the facility will meet the requirements of Education Code Section 47610. Nothing in the law requires a charter to state that the facility will be in non-field act complaint buildings.

Committee Question #6:

Will the board use the “substantial evidence” test when considering an expulsion directly?
--

Yes, if they choose to hear the expulsion directly without using a panel.

Committee Question #7:

How is the “holistic” approach of Montessori reconciled with the high stakes accountability? How do you meet/serve both masters competently?

Accountability is a component of every educational system, including Montessori. All educators want to be assured that students are finding success and working to their potential. Many Montessori schools, both private and public, have implemented various testing to gauge the growth of their students and to provide a formal reporting to parents.

Contrary to popular belief, Montessori is an adaptable philosophy. It was created that way in order to retain the focus on the child as opposed to the systems. It has been embraced by various cultures and methodologies with different ways of living and unique tools. Adaptations in the form that testing takes is the compromise that is reached with two systems working together for the benefit of the child. It is not unlike utilizing current research in child development and brain research such as Multiple Intelligences or Blooms Taxonomy in order to understand the child with greater depth. Modern practices in cultural development such as technology are incorporated in order to meet the Montessori philosophy of education for life. Children are assisted to learn how to learn and be proficient in the tools of their time.

With such adaptations, Montessori is capable of the compromises necessary to not only fit public school education for the masses but to make it pertinent in today's world. It is evolving along with the times. Technology is used so children are prepared for LIFE not just to meet the K-12 standards. It is already successful in the public school arenas and we have 14 thriving Montessori charter schools in California by which to model ourselves. RMCS is fortunate to have the support and counsel of the pioneers who developed the healthy balance of Montessori and traditional public education. We are eager to bring this unique and successful partnership to benefit the children of Sonoma County.

In practice, the Montessori partnership with public systems has long demonstrated its instructional quality and proven its success with meeting the standards of traditional education and specifically California standards (Please see the attached research and reports) while adhering to Montessori philosophy and practices in the classroom. A holistic approach in education simply allows for the synergistic development of all areas of the child. Rather than negate one of the "masters", this allows for the thorough meeting of the standards required by traditional education and high stakes accountability. The Montessori materials are purely the tools by which the student learns what is required.

Committee Question #8:
In the pacing guide provided, only 12 out of 26 state standards in reading for Kindergarten are addressed. Are all the content standards covered in the scope and sequence, if so where?

It is the intention of RMCS to consistently manage changes in state mandates, county directives and preferences, and current research. A curriculum committee including administration and faculty will collaborate to review and refine an alignment of Montessori materials and evolving state requirements to uniquely suit our school and the county's standards and preferences.

The alignment draft included with our charter is a working document and RMCS is glad to incorporate any changes that the county might wish to see and will ensure that each standard is clearly laid out in a way the County can easily identify.

January 28, 2009

Dear SCOE Board of Education, and, especially, the Adhoc Committee for the Consideration of the Charter Appeal of River Montessori Charter School:

I hope to briefly describe to you how River Montessori Charter School (RMCS) might adjust our budget if the need arises and share a little research on how well Montessori charter schools have met California state standards. As an introduction, let me say that I am an adviser to the RMCS Board and the school's business plan consultant.

You were probably as astounded and worried as I was from this week's announcement that the state may cut the education budget by 6.5%. And it may have given you cause for concern regarding the feasibility of initiating a charter school in this budget climate. So I think it would be helpful to explore how RMCS might deal with a large budget cut and, hopefully allay any concerns that you might have. As you can see from the table presented below, our revised budget would remain sound, with projected net revenue during our first three years of operation of \$225,778, even after the massive budget cut.

RMCS, like all charter schools and districts, would need to make some difficult choices with these budget cuts. But just as most, if not all, charter schools and one-school districts will remain viable, we expect, with equal confidence, to be viable. In fact, due to the federal \$600,000 Planning and Implementation grant we would be receiving, we may actually be in better position than more established charter schools and one-school districts. The main adjustment that we would make would be to hire one less teacher in year two and have one less teacher in year three as well. This would raise classroom size at our upper elementary level, including some 3rd graders, to 25 or 26. However, we think this is reasonable, especially given the format of Montessori education.

Potential Adjustments to RMCS Budget Due to Recent State Budget Cut Announcement

	Year One (‘09-‘10)	Year Two (‘10-‘11)	Year Three (‘10-‘11)
Original Revenue Projection	\$911,245	\$1,083,403	\$1,177,214
6.5% Cut in Education Funding (as opposed to the 2% increase in our budget)	\$(56,198)	\$(73,243)	\$(88,969)
Decrease in Lower Elem. Class Size Reduction, due to larger class size for some 3 rd graders	--	\$(16,496)	\$(19,795)
Additional P&I grant (would receive full \$600,000 rather than just \$500,000)	+\$30,000	+\$30,000	
Revised Revenue Projection	\$885,047	\$1,023,663	\$1,068,450
Original Expenditure Projection	\$762,003	\$1,001,686	\$1,103,436
One less upper el teacher (salary/benefits)	--	\$(56,976)	\$(61,027)
Additional computers (in \$600,000 grant)*	+\$12,000	--	--
Other (authorizing agency oversight and special ed reserve; % of revenue)	\$(1,613)	\$(2,446)	\$(2,982)
Revised Expenditure Projection	\$772,390	\$940,928	\$1,038,064
Original Net Revenue	\$149,242	\$81,716	\$73,779
Revised Net Revenue Projection	\$112,657	\$82,735	\$30,386

Following this letter I provide a few technical details on the budget adjustment process. I should add that the suggested changes herein are my recommendation but they have not yet been approved by the RMCS Board. If the budget cuts are even more pronounced than a one-time 6.5% cut, then RMCS would need to make further difficult choices. The following items could potentially be cut in years two and three: reduction in amount for instructional supplies, travel, and staff development, and not hiring the Receptionist/Admin Assistant until year four.

Related to the issue of Montessori charter schools meeting state standards, which seemed to be a significant concern of SCOE staff, I present the API scores for the 14 charter Montessori schools for 2008. (Note that CMP American River API is the composite of AMP American River and Carmichael schools.) The average API of the Montessori Charters is 787, slightly higher than the state average of 776. While Montessori schools are not generally the highest scoring on the API, they are generally meeting the state standard (with one exception, Antelope Valley Desert.)	Montessori Charter School	2008 API
	Antelope Valley Desert Montessori	579
	Blue Oak Charter Montessori	864
	CA Montessori Proj., Capitol Campus	813
	CA Montessori Proj., Elk Grove	745
	CA Montessori Proj., Shingle Springs	864
	CA Montessori Proj., American River	794
	Dixon Montessori	695
	Eagle Peak Montessori (Walnut Creek)	866
	Maria Montessori Ch. Acad. (Rocklin)	783
	Mountain View Montessori (Victorville)	788
	Sierra Montessori (Grass Valley)	848
	Sonoma Charter School	835
	Tree of Life (Ukiah)	755
	Average	787
Median	794	
State, all schools (Grades 2-6)	776	

Clearly, in practice, students enrolled in Montessori charter schools have demonstrated that they are able to meet an acceptable measure of performance, as defined by the California Department of Education. Since we will be borrowing much of our curriculum and framework from Eagle Peak Montessori and the California Montessori Project schools, we would hope to have a similar level of performance as those schools.

I hope that I have clearly expressed our confidence that we will be able to deal with whatever budget cuts or financial situation comes our way. If not, please do not hesitate to speak with me, 707-765-6448, or timlohrentz@sbcglobal.net. Likewise, I also hope that describing the track record of other Montessori charter schools on the state API will help you feel better about the ability of a Montessori curriculum to meet state standards.

Sincerely,



Tim Lohrentz, MUPP, RMCS Business Plan Consultant
 Program Manager, Insight Center for Community Economic Development

Technical Notes for the Budget Revisions:

- The \$600,000 grant budget called for increases in a number of expenditure items over the \$500,000 grant budget. With the exception of the \$12,000 increase in computers, we would hope to utilize the amounts specified in the \$500,000 budget, with the surplus being re-directed toward Director Salary and Lease.
- Seventeen 3rd graders in year two and 20 in year three would be in grade 3-5 classrooms with more than 20 students and not eligible for class size reduction. The remaining 1-3 graders still would.
- The authorizing agency oversight expenditure and special ed reserve expenditure are based on a percentage of revenue; therefore, with a decrease in revenue these items also decrease.

SONOMA COUNTY OFFICE OF EDUCATION CHARTER SCHOOL MATRIX

PART ONE: Initial Charter Petition to SCOE...E.C. 47605.5 Charter Petition Review on Appeal...E.C. 47605 (j) (1)
 Annual Performance Audit Charter Renewal 12/08

REQUIRED PETITION SIGNATURES IF CONVERSION OF EXISTING PUBLIC SCHOOL (Education Code 47605(a))			
• 50% of permanent status teachers of school to be converted, in the form required by law	Yes	No	N/A
REQUIRED PETITION SIGNATURES IF NOT CONVERSION OF EXISTING PUBLIC SCHOOL (Education Code 47605(a))			
• 50% of parents/guardians of the number of age appropriate students expected to enroll for 1st year of operation, in the form required by law	Yes x	No	N/A
OR			
• 50% of the number of appropriately credentialed teachers expected to be employed during 1st year of operation, in the form required by law.	Yes	No	N/A
REQUIRED AFFIRMATIONS (Education Code 47605(d)(1))			
Statement that school will be non-sectarian in its programs, admission policies, employment practices, and all other operations, will not charge tuition, and will not discriminate against any pupil on the basis of ethnicity, national origin, gender or disability	Yes	No	N/A
REQUIRED ELEMENTS (Education Code 47605(A)-(P))/ADDITIONAL REQUIRED INFORMATION			
A. Educational Program	Yes	No	N/A
1. Targeted School Populations			
Age, grade levels and number of students (page 1)	x		
Describe students whom the charter will attempt to educate; describe how the charter will improve learning for the targeted population (page 3, Section D)	x		
Clear and concise Mission Statement that defines the purposes and nature of the charter school (pp. 2 & 5)	x		
2. Attendance			
Includes school year/day, academic calendar, number of school days and instructional minutes (Appendix J)	x		
Includes attendance expectations and requirements (Section D, p. 24)	x		
3. What it Means to be an Educated Person in The 21st Century			
Objective of enabling pupils to become self-motivated, competent, lifelong learners (pp. 3&5)	x		
Clear list of general academic skills and qualities important for an educated person (pp. 28-32, Sect. D)	x		
Clear list of general non-academic skills and qualities important for an educated person (pp. 7-8, 12-13)	x		

4. Description of How Learning Best Occurs	Yes	No	N/A
Framework for instructional design aligned with needs of target population and based upon successful practice and research (pp. 10-13 – research is totally based on Montessori’s early 1900’s research)	x		
Description of instructional approaches and strategies including curriculum, teaching methods, materials and technology (reported throughout)	x		
Description of basic learning environment (e.g., site-based, independent study, etc.) (p. 14)	x		
Discussion of how chosen instructional approach will enable students to achieve objectives specified in the charter and master academic content standards in core curriculum areas (p. 11)	x		
Proposed program strongly aligned to school's mission (Section G aligned to mission on pp. 4-6)	x		
Proposal includes, at a minimum, full curriculum for one course or grade level; Proposal also provides that a full curriculum will be submitted prior to the opening of school (progress measures are not displayed although mentioned in Sect. E, DAR2 and DWA are mentioned in Section E).	x		
Describes how charter school will identify and respond to needs of students not achieving at or above expected levels (p. 19, 21; see notes)	Partially		
Describes how the charter school will identify and respond to needs of students who are academically high achieving (p. 19; see notes in binder)	Partially		
Describes how charter school will identify and respond to needs of English Learners (p. 19-20, missing 30 minutes of ELD instruction)	Partially		
Describes how charter school will identify and respond to needs of students with disabilities (See Special Education section starting on page 13 of this matrix) (pp. 20-23 - Legal components are addressed but description of response to students like RtI for cognitive and physically disabilities are not)	Partially		
5. Additional Requirements for Charter Schools Serving High School Students	Yes	No	N/A
How Charter School will inform parents about the transferability of courses to other public high schools			x
How Charter School will inform parents about the eligibility of courses to meet college entrance requirements			x

Comments:

B. Measurable Student Outcomes and Other Uses of Data	Yes	No	N/A
Describes clearly measurable outcomes to be used by charter school, e.g., attainment of skills, knowledge and attitudes listed in goals in school educational program (Attributes, not outcomes are listed – pp. 7-8, 28-32)	Partially		
How pupil outcomes will address state content and performance standards in core academics (no pupil outcomes related to content and performance standards are given in the program description)		x	
Clearly stated exit outcomes including acquisition of academic and non-academic skills (Attributes are included, pp. 26-28 academic and pp. 32-34 non-academic)	x		
Affirmation that "benchmark" skills and specific classroom-level skills will be developed (pp. 32-33)	x		
Affirmation/description: exit outcomes will align to mission, curriculum and assessments (couldn't find)		x	
Affirmation that college-bound students wishing to attend California colleges or universities will have the opportunity to take courses that meet the "A-G" requirements			x
Lists school-wide student performance goals students will achieve over a given period of time: Projected attendance levels, dropout percentage, graduation rate goals, etc. (academic-p. 29, attendance-p. 28, dropout-none)	Partially		
Acknowledges that exit outcomes and performance goals may need to be modified over time		x	
If high school, graduation requirements defined and WASC accreditation addressed			x
Comments: Student outcomes are not provided although academic and non-academic attributes and goals are stated.			
C. The Method by Which Pupil Progress in Meeting the Pupil Outcomes Will be Measured	Yes	No	N/A
At least one assessment method or tool listed for each of the exit outcomes			
Assessments include multiple, valid and reliable measures using traditional/alternative tools (STAR-p. 25,27 and 14 and some reading/language arts are mention in Section E)	Partially		
Assessment tools include all required state and federal assessments (Including STAR, API, AYP, CHSEE, CELD and physical performance test) (pp. 25-27)	x		
Chosen assessments are appropriate for standards and skills they seek to measure (limited number assess.)	x		
Description of how assessments align to mission, exit outcomes, and curriculum		x	
Describes minimal required performance level necessary to attain each standard (partially addresses school level performance (pp. 26-27) but not student perf. per standard (Section K-report card))	Partially		
Outlines plan for collecting, analyzing/utilizing and reporting student/school performance data to school staff (pp. 32-33), parents/guardians (pp. 28 and 33) and SCOE (none)	Partially		
Comments: Student outcomes are not provided although academic and non-academic goals are.			

D. Governance Structure of School Including, But Not Limited to, Parental Involvement	Yes	No	N/A
Describes what role parents have in the governance and operation of the school	X		
Describes key features of governing structure (usually a board of directors) such as:	Partially		
• Compliance with Brown Act, Public Records Act and Conflict of Interest Policy	Partially		
• Size/composition of board, board committees and/or advisory councils		X	
• Board's scope of authority/responsibility along with role of school administration		X	
• Method for selecting initial board members along with Board election/appointment and replacement procedure		X	
•Describes how Board will be developed in terms of supplementing necessary skills and providing training in effective board practices	X		
Includes proposed bylaws, basic policies for Board functions, as well as those necessary for opening and operating a school and/or similar documents	Partially		
Initial governing board members identified by name or the process to be used to select them	Partially		
Clear description of the legal organization of the charter school including evidence of non profit public benefit status, if applicable		X	
Outlines other important legal or operational relationships between school and granting agency in accordance with the general contents of an MOU or Operating Agreement	X		
Describes structure for providing business/administrative services including personnel, accounting, payroll, etc.	X		
Comments: The Petition does make general statements about governance while repeatedly stating that it will act in accordance with its Bylaws. They Bylaws contain conflicting and significantly varying provisions. For example, the Petition acknowledges the right of its Board to delegate, but with limitations. The Bylaws allow the complete delegation to an outside third party. The Petition sets forth roles of its Board of Directors and compliance with Brown Act. However, Bylaws describe an Executive Committee that can make all decisions of the Board and no recognition of Brown Act compliance. The Petition and Bylaws contain conflicting statements about conflict of interest laws.			
E. Qualifications to be Met by Individuals to be Employed by The School	Yes	No	N/A
Describes qualifications to be met by those to be employed by school, including standards to be used in hiring teachers, administrators and other school staff	x		
Includes general qualifications for various categories of employees and desired professional backgrounds, depth of experience and other qualities to be sought in their selection	Partially		
Specifies key positions in each category, along with additional qualifications expected of individuals to be selected for these positions	Partially		
Defines core academic teachers & affirms they will hold appropriate Commission on Teacher Credentialing certificate, permit or other equivalent document; provides specific credentials to be required along with discussion of how this will satisfy requirements for “highly	x		

qualified teachers” under the No Child Left Behind Act			
Identifies teaching positions which are not considered core academic, along with required qualifications	Partially		
Comments:			
F. Health and Safety Procedures	Yes	No	N/A
Affirms that each employee will furnish the school with a criminal record summary, as well as proof of freedom from tuberculosis	x		
Outlines specific health and safety practices addressing such key areas as:			
• Seismic safety (structural integrity and earthquake preparedness)	x		
• Natural disasters and emergencies	x		
• Immunizations, health screenings, administration of medications	x		
• Zero tolerance for use of drugs and tobacco	x		
• Staff training on emergency and first aid response	x		
References accompanied by a detailed set of health and safety related policies/procedures or the date by which they will be adopted and submitted to the SCOE	x		
Comments:			

G. Means to Achieve a Racial and Ethnic Balance	Yes	No	N/A
Lists specific practices/policies designed to attract a diverse applicant pool/enrollment:	Partially		
Practices and policies appear likely to achieve targeted racial and ethnic balance		X	
Comments: The petition states that RMCS “recruits” qualified personnel who reflect the ethnic and racial demographics of the student body. There are no specific practices or policies included that are designed to attract a diverse applicant pool/enrollment and as such do not address an effort to achieve a targeted racial and ethnic balance. Given the community of Old Adobe, it does not appear from the Petition that there is a comprehensive effort to have a broad and successful recruiting effort for students.			
H. Admissions Requirements	Yes	No	N/A
Mandatory assurances regarding non-discriminatory admission procedures	X		
Admission preferences which are required for conversion charter schools, if applicable			
Clearly describes admissions requirements, including any admission preferences	Partially		
Proposed admissions and enrollment process and timeline, as well as procedures for public random drawings, if necessary	X		
Comments:			
I. Financial Audit	Yes	No	N/A
Describes manner in which annual, independent financial audit will be completed by December 15 following the close of each fiscal year	x		
Describe who will be responsible for contracting and overseeing the independent audit	x		
Specifies that the auditor will have experience in education finance	x		
Describes the scope of the audit including a review of average daily attendance	x		
Provides scope and timing of audit, as well as required distribution of completed audit to the Sonoma County Office of Education, State Controller’s Office and California Department of Education	x		
Process and timeline for resolving audit exceptions and deficiencies to the satisfaction of the Sonoma County Office of Education	x		
Comments:			

J. Pupil Suspension and Expulsion	Yes	No	N/A
Detailed, step-by-step process by which student may be suspended or expelled (p. 52- App. L)	x		
Reference to a comprehensive set of student disciplinary policies (p. 53)	x		
Outlines or describes strong understanding of relevant laws protecting constitutional rights of students, generally, and of disabled and other protected classes of students, in particular. (Append. L)	x		
Policies balance students' rights to due process with responsibility to maintain a safe learning environment (Append. L)	x		
Explains how policies and procedures regarding suspension and expulsion will be periodically reviewed and modified		x	
Explains how SCOE may be involved in disciplinary matters		x	
Comments: Some concerns regarding full details on reasons for discipline, scope of authority of charter school to discipline.			
K. Staff Retirement System	Yes	No	N/A
Describes manner by which staff members will be covered by STRS, PERS and/or federal social security; or how the charter school will create a system to address employees' retirement funding	Partially		
Specifies specific positions to be covered by each system and staff designated to ensure that arrangements for coverage are made	x		
Comments:			
L. Attendance Alternatives	Yes	No	N/A
States that students may attend other schools or pursue an inter-district transfer in accordance with existing district or county enrollment and transfer policies and/or description of other attendance alternatives		x	
Provides that parents/guardians will be informed that students have no right to admission in a particular school in any district as a consequence of enrollment in the charter school (p. 52)	x		
Comments:			
M. Description of Employee Rights	Yes	No	N/A
States that collective bargaining contracts of SCOE will be controlling as to whether and how charter school staff may carry over Sick/vacation leave if allowed to resume former	x		

employment within SCOE, if applicable			
States that collective bargaining contracts of SCOE will be controlling as to whether and how charter school staff may continue to earn service credit (tenure) with SCOE while at charter school, if applicable	x		
Comments: Petition contains illegal provision regarding recruitment of staff.			
N. Dispute Resolution Process	Yes	No	N/A
Outlines a simple process for the charter school and the Sonoma County Office of Education to settle disputes relating to the provisions of the charter	X		
Outlines process by charter school will resolve internal complaints and disputes	X		
Comments: Process for dispute resolution with SCOE overboard in that it covers issues of possible revocation.			
O. Labor Relations	Yes	No	N/A
States whether charter or SCOE will be employer for EERA purposes	x		
If Sonoma County Office of Education is to be the employer, includes provisions clarifying charter's role in collective bargaining process			x
Comments:			

P. Closure of Charter School	Yes	No	N/A
Outlines a detailed description of the process to be used if the charter school closes	X		
Process includes a final audit of the charter school, specific plans for disposition of all net assets and liabilities, as well as for the maintenance and transfer of pupil records	x		
OTHER CONSIDERATIONS			
Likelihood that the Petitioners Will be Able to Successfully Implement the Program of the Proposed Charter	Yes	No	N/A
The Petition includes a thorough description of the education, work experience, credentials, degrees and certifications of the individuals comprising, or proposed to comprise, the directors, administrators and managers of the proposed charter school		X	
The Petition includes a list of consultants whom the charter school has engaged, or proposes to engage, for the purpose of developing, operating and evaluating the charter school, together with a thorough description of the qualifications of such consultants.	X		
Does the information provided in the proposal confirm that the school will have the services of individuals who have the necessary background in curriculum, instruction, assessment, finance, facilities, business management, organization, governance and administration?		X	
Comments: Minimum qualifications for Director are concerning. Bylaws authorize complete delegation of day-to-day operation to unknown group.			
Geographic and Site Limitations	Yes	No	N/A
Does the Petition propose to operate a single charter school within the county, or in the case of a charter proposal initially denied by a local governing board, within the geographic jurisdiction of the school district to which the charter was originally submitted?	x		
If not, does the Petition demonstrate any basis for an exception permitted by law? In this case, does the Petition provide for the notification steps required by law?			x
Does the Petition identify the precise location where the school will operate?		x	
Does the Petition include a description of the facilities in which the charter school will operate?		x	
Grade Level Limitations (For Petitions Being Reviewed on Appeal)	Yes	No	N/A
In the event an Initial Charter Petition proposes to serve one or more grade levels not served by the district which initially denied the Petition, does it propose to serve all of the grade levels which are served by the district?			x

EFFECTIVE DATE	Yes	No	N/A
Does the Petition demonstrate that the charter school will commence operation by September 30 of its first year of operation?	Partially		
FINANCIAL & ORGANIZATIONAL ACCOUNTABILITY	Yes	No	N/A
A detailed review of the annual budget development, implementation and review process including the process by which the charter school leadership and governance team will monitor and report regarding the continuing financial solvency of the school.	x		
Detailed description of the manner, format and content by which the charter school will regularly report its current and projected financial viability	x		
Detailed description of the organization, scope and preparation of the following financial documents and reports: a. A preliminary budget on or before July 1 each year. b. An interim financial report, reflecting changes through October 31, on or before December 15 each year. c. A second interim financial report, reflecting changes through January 31, on or before March 15 each year. d. A final unaudited, financial report for the full prior year on or before September 15 each year.	x		
Description of the process by which the school will comply with all reports required for charter schools by law; includes copy of each required report to SCOE	x		
Comments:			
REQUIRED SUPPLEMENTAL INFORMATION (Education Code 47605(g))			
Financial Plan	Yes	No	N/A
First year operational budget			
• Start-up costs	x		
• Cash flow for first three years	x		
• Financial projections for first three years	x		

Planning Assumptions	Yes	No	N/A
• Number/types of students	x		
• Number of staff	x		
• Facilities needs	x		
• Costs of all major items are identified and within reasonable market ranges	x		
• Revenue assumptions in line with state and federal funding guidelines	x		
• Revenue from “soft” sources less than 10% of ongoing operational costs	x		
• Timeline allows window for referenced grant applications to be submitted and funded	x		
Start-Up Costs	Yes	No	N/A
• Clearly identifies all major start-up costs			
Staffing	x		
Facilities	Partially		
Equipment and Supplies	x		
Professional Services	x		
• Assumptions in line with overall school design plan	x		
• Identifies potential funding source	x		
• Timeline allows for grant and fundraising	x		
Annual Operating Budget	Yes	No	N/A
• Annual revenues and expenditures clearly identified by source	x		
• Revenue assumptions closely related to applicable state and federal funding formulas	x		
• Expenditure assumptions reflect school design plan	x		
• Expenditure assumptions reflect market costs	x		
• “Soft” revenues not critical to solvency	x		
• Strong reserve or projected ending balance (the larger of 3% of expenditures or \$25,000)		x	
• If first year is not in balance, identifies solvency in future years and sources of capital sufficient to cover deficits until the school year when the budget is projected to balance		x	
• Expenditure for general liability, workers compensation & other types of insurance with evidence that petitioners have researched cost and availability: policies to name the SCOE as also insured and provide hold harmless agreement	x		
• Expenditure sufficient for reasonably expected legal services	x		
• Expenditure for Special Education excess costs consistent with current experience in the school district/county	x		
Cash Flow Analysis	Yes	No	N/A
• Monthly projection of revenue receipts in line with local/state/federal funding disbursements	x		

• Expenditures projected by month and correspond with typical/reasonable schedules	x		
• Show positive fund balance each month and/or identify sources of working capital			
Long-term Plan	Yes	No	N/A
• Projects revenues and expenditures for at least two additional years	x		
• Revenue assumptions based on reasonable potential growth in local, state and federal revenues	x		
• Revenue assumptions based on reasonable student growth projections		x	
• Reasonable cost-of-living and inflation assumptions		x	
• Annual fund balances are positive or sources of supplemental working capital are identified		x	
If the charter school intends to enter a contract with an educational management organization (EMO), does the proposal include the following:			x
Description of the proposed contract including roles, responsibilities, payment structure, conditions for renewal/termination and investment disclosure?			x
Description of EMO's role in the financial management of the charter school and the internal controls which will guide this relationship?			x
List of other schools managed by EMO including contract information?	Yes	No	N/A
Summary of EMO history and philosophy, past results of school management efforts and background on its corporate leaders?			x
Comments:			
Impact Statement	Yes	No	N/A
Provides estimated numbers of students anticipated to enroll	x		
Identifies whether charter will request to purchase support services from SCOE or district	x		
Describes suggested processes and policies between charter and SCOE			
Includes: Process, activities and associated fees for oversight of charter	x		
• Content, processes, timelines, and evaluation criteria for annual review and site visits			
• Regular, ongoing fiscal and programmatic performance monitoring and reporting	x		
• Content, process, timelines and evaluation criteria for charter renewal			
Proposed support service needs and suggested payments to SCOE or district for services	x		

• Clearly drafted contract/agreement or reference to MOU	Yes	No	N/A
Identify whether a request will be made for use of SCOE or district-owned facilities			x
Reasonably detailed lease or occupation agreement for privately obtained facilities		x	
Proposed legal status of school is identified	x		
Describes the manner in which administrative services of the charter school are to be provided	x		
Identify whether school intends to manage risk independently or will seek to secure coverage through the Sonoma County Office of Education or other public agency	x		
Addresses potential civil liability effects, if any, upon the school and the SCOE	x		
Comments:			
Special Education/SELPA (Sonoma County SELPA Charter School Policy)	Yes	No	N/A
Identifies whether the charter will be an independent LEA for special education purposes	X		
Has consulted with the Sonoma County SELPA Director	X		
Discussed special education responsibilities of charter			
Discussed application of SELPA policies			
Describes how special education services will be provided consistent with Sonoma SELPA Plan and/or policies and procedures	X		
• Includes fiscal allocation plan			
• If charter not an independent LEA:			X
• Clarifies in charter or an MOU the responsibilities of each party for service delivery			X
Referral			X
Assessment			X
Instruction			X
Due Process			X
Agreements describing allocation of actual and excess costs			X
Charter fiscally responsible for fair share of any encroachment on general funds			X
If charter is LEA within SELPA	Yes	No	N/A
• Notifies SELPA Director of intent prior to February 1 st of the preceding school year		X	
• Located within Sonoma County SELPA geographical boundaries			
• Provides current operating budget in accordance with Ed Code 42130 and 42131			
• Provides assurances that all be instructed in safe environment			
• Provides copy of original charter petition and any amendments			

• Responsible for any legal fees relating to application and assurances process	Yes	No	N/A
• Meets the terms of the “Agreement Regarding the Organization, Implementation, Administration and Operation of the Sonoma SELPA”			
• Meets the terms of all Sonoma SELPA policies and procedures			
• Charter fiscally responsible for fair share of any encroachment on general funds			
Petition includes the following assurances:			
• The charter will comply with all provisions of IDEA	X		
• No student will be denied admission based on disability or lack of available services	X		
• Will implement a Student Study Team process	X		
• Any student potentially in need of Section 504 services will be the responsibility of the charter school	Partially		
Petition/MOU describes the process for notifying district of residence and authorizing school district when a special education student enrolls, becomes eligible, ineligible and/or leaves charter school			
Overview of how special education funding and services will be provided by:			
• Charter School			
• Sonoma County Office of Education			
• SELPA	Yes	No	N/A
Petition/MOU describes the transition to or from a district when a student with an IEP enrolls in, or transfers out of, the charter school			
Comments: SELPA Director was satisfied with Special Education provisions of Petition and felt that SELPA would be willing to waive February 1 deadline.			
ANNUAL PERFORMANCE AUDITS			
Petition/MOU describes what will be included as part of performance audits, including:	Yes	No	N/A
• Review of each component of Initial/Renewal Charter Petition for compliance			
• Analysis of whether goals are being met; review of all state and federal student assessment data and reports			
• Summary of major decisions made/policies established by the board in each year			
• Data on level of parent involvement in governance and operation of the school			
• Summary data from annual student/parent satisfaction survey			
• Data regarding number of staff, their qualifications and verification of credentials	Yes	No	N/A

• Copy of health/safety procedures and summary of any major changes			
• Review of the suitability of the facility in terms of health and safety			
• Review of the suitability of the facility in terms of educational utility			
• Review copies of all required documentation (e.g. budget reports, financial			
• Overview of admission practices			
Number of students actually enrolled			
Waiting lists			
Expulsions and suspensions			
• Review of any internal/external dispute resolutions			
projections, leases, insurance, etc.) Site visit by granting agency including observation of the instructional program			

Comments:

CHARTER RENEWAL
Did the Charter School Do What It Said It Would Do?

NOTE: The renewal process follows all of the same steps and requires all of the same information as a new charter proposal

Questions to Address	Yes	No	N/A
Terms of the Charter			
Are all the required terms of the charter in place, including changes in Charter School Law and Regulations?			
Are all the terms of the original/amended charter fully implemented?			
Are the implemented programs consistent with the terms of the charter?			
Are the operations consistent with the terms of the charter?			
Academic Program			
Has the school made reasonable progress in meeting internally established goals?			
Is student performance significantly improved and/or consistently strong as	Yes	No	N/A

indicated by test results, API and AYP? Effective January 1, 2005, or after the charter school has been in operation four years, whichever is later, does the charter school meet the renewal requirements contained in the Charter Schools Act?			
Viability of School			
Financially solvent?			
Enrollment stable and near capacity?			
School governance sound?			
Professional staff competent?			
Submission of charter renewal proposal in accordance with timelines and process outlined in Sonoma County Board of Education Policy	Yes	No	N/A
When approved or denied, the SCOE will forward notice to CDE and other agencies as required by law			
Comments:			

March 2004 Revision



800 Hutchinson Rd., Walnut Creek, CA 94598
(925) 946-0994 Fax: (925) 946-9409

September 9, 2008

Ms. Mary Colbert
President, Board of Directors
Old Adobe Union School District
Petaluma, CA 94952

Dear Ms. Colbert,

My name is Krista Ericson and I am one of the founders of Eagle Peak Montessori School, originally chartered by the Mt. Diablo Unified School District in March 2000 and renewed for a second 5-year term in 2005. Our school currently serves 175 students in grades 1 through 5 on an elementary campus provided by the Mt. Diablo district. I have served on the school's board of directors since the school's inception and as the school's first administrator for its first three years.

The concept of starting a charter Montessori elementary school in central Contra Costa County began in 1998 with a dedicated group of Montessori parents who didn't want their Montessori experience to end when their children completed kindergarten. Once enough parents were committed to working on a charter school, community members, Montessori educators and consultants were recruited and together we rolled up our sleeves and began researching the process, honing our vision and mission, writing the charter, and getting it approved.

Throughout the process we worked closely with the district's "charter committee", consisting of the Assistant Superintendent for Elementary Education and 13 staff members, each representing one department of the district. Together we hammered out the terms of the charter, negotiated space for the school and agreed upon terms for Memorandums of Understanding. From the inception of the project, the charter school and the district have looked upon one another as partners — the district providing the charter school with needed administrative support and the charter school providing the district a valuable educational choice for families. From the time the school was chartered to the present, we have continued to enjoy a mutually beneficial, collaborative relationship with the Mt. Diablo District.

For the past four years Eagle Peak has maintained an API over the state required 800 and now ranks in the top quartile of Mt. Diablo's elementary schools. We believe that Montessori belongs in the public setting and that our curriculum not only meets the state standards but exceeds them. Our staff has successfully and convincingly aligned Montessori curriculum with state standards, and has introduced or designed special lessons for any standards that are not specifically covered by traditional Montessori curriculum. I believe the key to Eagle Peak's success is our commitment to stay true to Montessori values. Our educational and philosophical

perspective profoundly respects and supports each child's unique development and acquisition of knowledge. Because we provide an atmosphere of acceptance, respect, and trust, we foster creativity, learning and a sense of community in our students.

Parents were essential to the creation of Eagle Peak and continue to play a key role in the everyday operation of the school. Eagle Peak requires our parents to volunteer 40 hours per school year. In a school of only 175 students we see a minimum of 5-10 parent volunteers on campus every day volunteering in classrooms, driving on field trips or helping with special projects. During the 2007-08 school year, almost 8400 hours were logged by parent volunteers averaging out to over 60 hours per family.

As one of the founders of Eagle Peak Montessori School, I couldn't be more thrilled at the outcome of our humble project. It truly demonstrates what a group of dedicated citizens can accomplish by creating positive change in their communities. I applaud the vision and determination of the group of parents and educators who are presenting to you their charter petition for the River Montessori Charter School. I urge you to consider the merits of the project and embrace school choice for the families in your district.

Sincerely,

A handwritten signature in cursive script that reads "Krista Ericson".

Krista Ericson
Member, Board of Directors
Eagle Peak Montessori School

Stephen P. Collins, Ed.D
1275 Eucalyptus Ave.
Petaluma, CA 94952

(707)763-8569

FAX (707)795-9145

stephencollins37@comcast.net

Ms. Cindy Lohrentz
731 H Street
Petaluma, CA 94952

November 1, 2008

Dear Ms. Lohrentz:

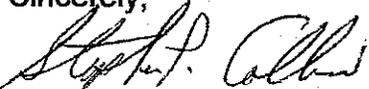
I am sending this letter to you as an endorsement of the proposed River Montessori Charter School. Please use this letter in any way you wish to support your establishment of a Montessori charter school for Sonoma County.

By way of background, I retired from the position of Assistant Superintendent for Curriculum and Instruction in the Petaluma City School. Following retirement, I served as a consultant for several charter schools, including the Waldorf Sebastopol Independent Charter School, Mary Collins Charter School at Cherry Valley, and other charter schools in Marin and Alameda counties. Further, I served full year as interim superintendent and principal of both Two Rock Union and Wilmar Union School districts. These experiences, I believe, qualify me to recommend the establishment of a Montessori charter school.

I know about Maria Montessori and the Montessori philosophy. As an experienced educator I know quality programs when I see them. The Montessori method has the elements that make students successful academically and as lifelong learners. It also instills core values that parents and teachers treasure. I trust that the River Montessori Charter School will provide rich Montessori educational guidelines and the Board of Directors will provide the leadership to ensure that this is a successful school both educationally and fiscally. The establishment of a Montessori Charter School in Sonoma County will provide increased, high quality, learning opportunities for students, and a viable option for their parents.

It is with enthusiasm that I support the establishment of the River Montessori Charter School.

Sincerely,



Stephen P. Collins

December 1, 2008

To Whom It May Concern:

I am a Montessori educator, writing in support of the approval of River Montessori Charter School. I have been the director of the Montessori Academy at Eagles Peak Charter School in Southern California (not to be confused with Eagle Peak Montessori in Northern California), and I can say, without reservation, that a Montessori inspired public school will be an amazing addition to all of the wonderful educational options available in Sonoma County. Through teaching and directing a Montessori school, I have seen children flourish, thrive, and continuously meet and exceed the high expectations as outlined by the California Content Standards. I have been watching this project, almost since its inception, and have been so impressed, that I have applied for the position as director of the school.

I have been able to see the board members interact with each other during a board meeting, and was very impressed with the level of intelligence, professionalism, and passion exhibited by all members. It is clear to me that this project has been carefully planned, and that the persons steering the project have a very clear vision in mind in terms of both providing an individualized Montessori curriculum, and meeting important state standards and requirements.

It is my sincere hope that the Sonoma County Office of Education will recognize what an exciting opportunity it would be to support an authentic Montessori public school. The Montessori philosophy sets students up to be passionate, life long learners, and, according to Angelina Lillard in "Montessori: The Science Behind the Genius," the best universal teaching practices are in concert with Montessori philosophy of teaching and learning.

Thank you very much for your time, and please feel free to call me with any questions you may have.

Sincerely,

Letty Rising
951 970-7327

RECEIVED

November 12, 2008

NOV 17 2008

Dear Sonoma County Board of Education:

SCOE
SUPERINTENDENT'S OFFICE

This letter is in support of the dedicated group of River School parents and friends who are petitioning for a Public-Montessori Charter within your school district jurisdiction.

My name is Julie Macdonald, and I am a credentialed Lower Elementary Montessori teacher. I initially met several River School founders last winter when I interviewed with them for a teaching position. The professionalism with which they conducted themselves was above and beyond that which I had previously encountered any time throughout my career. During the interview process, I admired their preparation, knowledge and level of respect for each other that brought them together as an extremely strong, cohesive unit. I made note of their unparalleled unity as it is not often that apparent in a group setting.

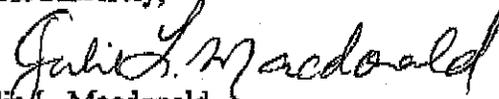
Since that time, I have had the privilege of communicating with a few other River School founding parents regarding various issues, and I find the same dedication, knowledge and passion in each person. However, these parents are not only passionate for their children's future, but also the future of those children they have yet to meet. It is my understanding that they believe, as I do, that each child deserves an education that meets his or her own individual needs, no matter whether that child is a public or private school student.

This is not to say that the public school system does not address children's needs or respect each child as an individual. However, having spent time in both types of educational environments, Montessori and public, I adamantly feel that bringing the Montessori philosophy into a public school classroom serves to further facilitate and foster not only a child's academic development but his or her moral and social development as well.

The Montessori philosophy gives a child a much needed sense of autonomy and ownership over his or her own education because the curriculum is set forth in such a way that the child feels part of the educational decision making process within appropriate parameters. This leads to a sense of responsibility for oneself, one's own environment and the world at large - a goal all educators work towards for their students.

Again, this argument in favor of a Montessori education is not to say that the public school system is lacking. However, a Montessori public charter offers the best of both worlds, giving parents another choice in the education of their children. And parents who have choices, also feel a sense of ownership and are more likely to become involved in their school community. As we all know, there was a time when education was an option for only a select few. Public education has righted this wrong. Granting the River School petition is a chance to move one step further towards equality, making an educational option generally only available to the affluent, available to all.

Most Sincerely,


Julie L. Macdonald

Carol Evans Treu
7 Kazen Way
Petaluma CA 94952
November 13, 2008

RECEIVED

NOV 21 2008

SCOE
SUPERINTENDENT'S OFFICE

Sonoma County Board of Education
Sonoma County Office of Education
5340 Skylane Boulevard
Santa Rosa, CA 95403-8246

Dear Board Members,

I am pleased to write this letter to support the charter application of River Montessori Charter School. I have been in regular conversation with River Montessori Charter School board member, Cindy Lohrentz about the vision parents hold for this school. Their organization, program and planning are comprehensive, well thought-out and most importantly, designed to offer an exceptional education for students. For well over a year, I have been privileged to hear how they worked to marry their vision with the federal and state requirements of charter school education and those of the Sonoma County Board of Education. They are well informed about all the topics and concerns that I brought to them from the experiences I had as principal of Mary Collins Charter School helping our faculty and parents apply for district charter school status in 2002. The breadth and depth of their knowledge was and still is, impressive.

I am convinced that the establishment of well organized charter schools based on the essential fundamentals of teaching and learning and supported by a carefully wrought philosophy of education can flourish without diminishing the role of other district public schools. Effective charter schools are able to provide local district schools with alternative models for education, as well as collaborative opportunities for professional development and for enrichment programs. My long experience with professional development for teachers taught me that they want access to successful models of instruction and assessment and welcome -- indeed are hungry for -- collaboration with their colleagues. The introduction of a strong charter school offers the possibility of bringing more opportunities for professional and student collaboration to Sonoma County schools.

Some educators express concern that a charter school will diminish enrollment in schools of the charter district. I believe an examination of charter school enrollment by district will show that intra-district transfers are not often a significant percentage of total charter enrollment. Mary Collins Charter School is a case in point. Before it was awarded its charter, it was in a period of declining enrollment. As soon as the charter was announced, enrollment increased -- most of it from out of district schools. Many of the new students were already in alternative schools and thus had no impact on district ADA.

The inclusion of excellent charter schools helps the county provide a wide range of educational approaches and philosophies and is consistent with the goal of offering the best education possible to all students. It is an efficient way to field test different approaches to learning, using California Learning Standards and standardized testing as base line guides. We can all learn from each others' successes and from our missteps.

And finally, a word about Montessori schools. They are an excellent model of schooling that evolved from Maria Montessori's deep understanding of children and how they learn. She created learning environments that include carefully designed materials to stimulate children's innate curiosity and ability to learn both independently and in a multi-age social environment. Learning in this environment happens naturally with adult guidance rather than constant direct instruction. It allows students "Eureka!" moments that cannot emerge from text book learning alone. In fact, I did not completely grasp the Pythagorean Theorem until I was in my twenties and saw it represented in Montessori math blocks for primary students. It was my own delayed "Eureka!" moment.

I urge you to accept River Montessori Charter School's application to become a Sonoma County Charter School. This school holds great promise for its students and for becoming an integral part of the County's continuing efforts to cultivate an exemplary school system.

Sincerely,



Carol Evans Treu
Mary Collins Charter School
Principal, 1998 -2004



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NOV - 6 2008

SCOE
SUPERINTENDENT'S OFFICE

November 3, 2008

Sonoma County Office of Education
5340 Skylane Boulevard
Santa Rosa, CA 95403-8246

Dear Sonoma County Board of Education:

I understand that a group of community members has approached you for the approval of River Montessori Charter School; I am writing now to urge you to approve their charter.

By approving River Montessori's charter, the County will be fulfilling the intent of the Charter Schools Act and the County's intention to increase learning opportunities for all pupils; to create new professional opportunities for teachers; and to provide parents and pupils with expanded choices in education as well as following the directive of law to encourage the creation of charter schools.

The Sonoma County Board of Education should give the children of Sonoma County the option to participate in a Montessori Charter School. There are only 14 Montessori Charter Schools in California and only one within Sonoma County in Sonoma, which is only loosely based on Montessori amongst other methods. Thus, River Montessori Charter School will provide an alternative to parents in Sonoma County who do not at present have this option. It will be an educational asset to Sonoma County.

A grassroots support network of parents and community members in Sonoma County has worked to make this alternative elementary school a reality. I support their right to charter and urge you to support approval of this charter. This charter school promises to be a high quality school; Montessori charter schools throughout the country have performed at or above national standards. Consequently, this charter will aid in meeting the national need for a highly educated workforce.

As a School Board Member, you have proven your desire to serve and guard the education of our children. Approving the River Montessori Charter will fulfill your commitment to the children of Sonoma County by providing the best possible educational options for them.

Sincerely,

A handwritten signature in cursive script that reads "Catrina Eames Dierke".

Catrina Eames Dierke, M.B.A.
Owner

RECEIVED**NOV - 7 2008****SCOE
SUPERINTENDENT'S OFFICE**

November 5, 2008

Sonoma County Board of Education
5340 Skylane Blvd.
Santa Rosa, CA 95403-8246

RE: River Montessori Charter School

Dear Esteemed Board Members,

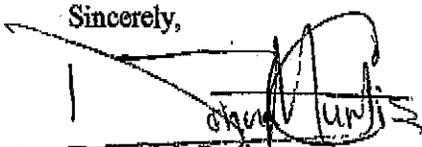
I grew up in Petaluma and when I married, my husband joined the Air Force and we have been world travelers for the last 27 years due to military duty stations. During that time, I sent my three children to Montessori schools in Germany and in southern California. I was so impressed with the Montessori method that I later became a certified Montessori teacher with a teacher certification in Early Childhood from the State of Maryland so I could teach the Montessori method in public schools where no Montessori schools existed. I taught in Okinawa, Japan, Germany, and Virginia. Always, the number one request from parents was for the continuance of a Montessori education for their children through the Elementary years.

Since I have returned to Petaluma, I have observed at some of our Montessori schools, attended a meeting for the establishment of the River Montessori Charter School, volunteered weekly at Cinnabar School, and spoken with parents about their needs. It is a very definite community need to have a Montessori Elementary School available to our public in Petaluma.

I have seen that the individuals establishing River Montessori Charter School are very dedicated and have worked very hard to fulfill all requirements toward their goal of opening a Montessori Charter School. I applaud their perseverance, their ethics, and determination.

I fully support the establishment of River Montessori Charter School and encourage you to approve this charter.

Sincerely,



Donna M. Curtis
441 Gossage Avenue
Petaluma, CA 94952

707-762-6524

DonnaMCurtis@hotmail.com



CITY OF PETALUMA

POST OFFICE BOX 61
PETALUMA, CA 94953-0061

Teresa Barrett
Councilmember

David B. Wolf, Ph.D.
5779 Trailwood Drive
Santa Rosa, CA 95404

October 28, 2008

RECEIVED
NOV - 6 2008
SCOE
SUPERINTENDENT'S OFFICE

Dear Sonoma County Board of Education Member:

I understand that a group of community members has approached you for the approval of River Montessori Charter School; I am writing now to urge you to approve their charter.

As a member of the Petaluma City Council, I have interacted with many community groups. I would like to assure the Sonoma County Board of Education that if they approve this charter, this group of individuals with their unceasing energy, commitment, and diverse skill set will see that River Montessori is a successful school, fulfilling its charter and providing the community of Sonoma County with a needed educational alternative.

Furthermore by approving River Montessori's charter, the County will be fulfilling the intent of the Charter Schools Act and the County's intention to create new professional opportunities for teachers, while following the directive of law to encourage the creation of charter schools.

The Sonoma County Board of Education should give the children of Sonoma County the option to participate in a Montessori Charter School. There are only 14 Montessori Charter Schools in California and only one within Sonoma County in Sonoma, which is only loosely based on Montessori amongst other methods. There is no question that River Montessori Charter School will be an educational asset to Sonoma County.

As a School Board Member, you have proven your desire to serve and guard the education of our children. Approving the River Montessori Charter will fulfill your commitment to the children of Sonoma County by providing the best possible educational options for them.

Sincerely,

Petaluma City Hall
11 English Street
Petaluma, CA 94952

Phone (707) 778-4345
Fax (707) 778-4419

E-Mail
teresa4petaluma@comcast.net

Tiffany Renée

Sonoma County Office of Education
5340 Skylane Boulevard
Santa Rosa, CA
95403-8246

RECEIVED

DEC - 3 2008

November 6, 2008

SCOE
SUPERINTENDENT'S OFFICE

Dear Sonoma County Board of Education:

I understand that a group of Sonoma County community members has approached you for the approval of River Montessori Charter School; I am writing now to urge you to approve their charter. I was able to attend Montessori Kindergarten in Sacramento as a child, and I have continued my education through graduate school with Montessori as a foundation. I remember very happy times.

As a Councilmember Elect for the Petaluma City Council, I have interacted with many community groups. I would like to assure the Sonoma County Board of Education that if they approve this charter, this group of individuals with their unceasing energy, commitment, and diverse skill set will see that River Montessori is a successful school, fulfilling its charter and providing the community of Sonoma County with a needed educational alternative.

Furthermore by approving River Montessori's charter, the County will be fulfilling the intent of the Charter Schools Act and the County's intention to create new professional opportunities for teachers, while following the directive of law to encourage the creation of charter schools.

The Sonoma County Board of Education should give the children of Sonoma County the option to participate in a Montessori Charter School. There are only 14 Montessori Charter Schools in California and only one within Sonoma County in Sonoma, which is only loosely based on Montessori amongst other methods. There is no question that River Montessori Charter School will be an educational asset to Sonoma County.

As a School Board Member, you have proven your desire to serve and guard the education of our children. Approving the River Montessori Charter will fulfill your commitment to the children of Sonoma County by providing the best possible educational options for them.

Sincerely,



Mark Powell
1403 Santa Fe Avenue,
Berkeley, CA 94702
mipowell@sbcglobal.net

RECEIVED

NOV - 5 2008

November 3rd, 2008SCOE
SUPERINTENDENT'S OFFICE

Sonoma County Board of Education
Sonoma County Office of Education (SCOE)
5340 Skylane Boulevard,
Santa Rosa, CA 95403-8246

Dear Board members,

I write to you in support of the application for charter by the River Montessori Charter School.

I believe I am well-qualified to write about the significance of the Montessori approach to education. I currently work as Technology Coordinator at *St. Paul's Episcopal School*, a progressive mainstream private K-8 school in Oakland CA. However I have taught in Montessori lower and upper elementary classrooms in the Boston area and the East Bay area for 14 years, and have been a teacher trainer at the *Center for Montessori Teacher Education, New York* for the last ten years. I am also part-time lecturer at the *Kalmanovitz School of Education, St. Mary's College of California*, Moraga, CA. I have a M.Ed. degree from *Lesley University* in Cambridge MA, and also a MA State teaching credential. I have published 15 articles on Montessori education in *Montessori Life* and various other non-Montessori journals, and have an article in a recently published book entitled *A Place for Play* edited by Elizabeth Goodenough. I have designed many classroom materials, several of which are now sold across the United States and internationally by companies such as *Hello Wood* and *Nienhuis Montessori*. I have delivered workshops at *American Montessori Society* national conferences and at private and public Montessori Schools from coast to coast, and have consulted for over 60 Montessori schools in my capacity as field consultant for CMTE/NY.

Maria Montessori developed her approach in the slums of Rome one hundred years ago by observing and testing her method with "street children" whom the Italian system of her day had abandoned. In the intervening century, the Montessori method has evolved a wide grassroots following among parents and teachers worldwide as a child-friendly approach that nurtures a life-long love of learning and promotes deep understanding of concepts without the pressures of testing and rote learning. What scientific research evidence there is supporting this wide brandname appeal to generations of parents and educators has been well summarized by Dr. Angeline Stoll Lillard in her book *Montessori: The Science Behind the Genius* and her many articles, including "Evaluating Montessori Education" in *Science* magazine, Vol. 313, September 2006 (www.sciencemag.org).

Although there are 250 public Montessori programs in the US, the vast majority of the roughly 6,000 Montessori programs in the United States serve wealthy middle class children who probably have the resources to do well under any pedagogy. Northern California in general, and the Marin County area in particular, have comparatively limited numbers of alternatives in the public system and would undoubtedly benefit from this proven approach.

The charter school movement is full of idealistic experiments in educational reform, many of which don't last longer than five years. What makes the Montessori approach different, and well worth your District's investment, is that it is a social movement with a long history and a substantial infrastructure to sustain it. There are many high quality Montessori teacher training institutions nationwide, each with a curriculum that is consistent in aims, materials and methods, despite minor local cultural adaptations, to the training received by Montessori teachers all over the world. This relieves teachers of the burden of having to reinvent the wheel—a prime factor perhaps in the burnout contributing to the short-lived nature of the majority of new charter schools.

While there are of course examples of Montessori schools which don't live up to their best potential, the Montessori movement in the United States as a whole is not a rigid, ossified pedagogy stuck in the past but a living, evolving organism influenced and enlivened by current trends and research. The *American Montessori Society* organizes annual national conferences that bring together up to 5,000 teachers from around the country who thrive on the input of dynamic speakers both from within and without the Montessori community. The AMS has for years generously funded research into Montessori best practices from multiple perspectives. That organization's 2007 Strategic Plan included a priority of promoting, supporting, and encouraging research in the Montessori community, and is proposing to fund a university-based research coordinator position to oversee new research promoting the Montessori method.

The Montessori approach to education bears a close resemblance to constructivism, an approach adopted 20 years ago by the *National Council of Teachers of Mathematics*, the *National Science Teachers' Association*, and the *Association for Supervision and Curriculum Development*, among other national organizations. It's not widely known however that Jean Piaget, its intellectual founder, was himself a student of Dr. Montessori and president of the *Swiss Montessori Society* for 25 years! Piaget did much of his initial research in a small Montessori school, so the two approaches are close siblings. But while constructivism is a philosophical paradigm that for the most part yearns for a consistent tradition of classroom practice and a widely available cache of classroom materials, the Montessori tradition boasts both a strong philosophy and a vibrant and dependable practice.

Particularly now, children in your school district—and across the United States—desperately need the broad shoulders of such a strong and consistent tradition to stand on.

Regards,

Mark Howell

Zimbra Collaboration Suite

mwallace@scoe.org

River Montessori Charter School

Mon Dec 8 07:13:43 2008

From: malin.guerrero@gmail.com

To: mwallace@scoe.org

Dear Mrs. Wallace,

I am writing to you in support of River Montessori Charter School. It is my opinion that this school must be an option for the children in the Petaluma area. I am a Montessori teacher myself and the parent of a kindergartner. After 12 years of teaching I have witnessed first hand the positive effect the Montessori philosophy has had on all my students as well as my daughter. The Montessori philosophy encourages children to become life time learners and to question the world around them, to be caring and concerned citizens of their community and the world at large.

There is a strong need and want for River Montessori Charter School. The parents are ready to send their children there when the doors open, the funding is already in place, the site has been located and secured, all the requirements have been met to open this school. All that is missing is a YES vote.

Please make the right decision for hundreds of children in the Petaluma area. This school will be a positive step forward for education in Sonoma County.

Sincerely,
Malin Guerrero



Orchard View School
700 Water Trough Road
Sebastopol, CA 95472
(707) 823-4709
www.orchardviewschool.org

December 5, 2008

Sonoma County Office of Education Board Members,
5340 Skylane Blvd.
Santa Rosa, CA 95403-8246

Dear Board Members,

My husband and I are writing in support of the proposed River Montessori Charter School. My husband, Timothy, and I are both educators. My husband is a credentialled Montessori School teacher and has taught Montessori preschool for 25 years. I have an elementary teaching credential. My husband and I owned and taught in a Montessori preschool for six years and I have taught in elementary classrooms for 18 years.

I am presently teaching at Orchard View School Independent Study Charter in the Twin Hills School District where I have met several of the families who are supporting the River Montessori Charter School. I have been encouraged by their perseverance, organization and commitment to create a charter school that will provide a unique and new alternative to our education community.

The Montessori philosophy of education is unlike anything available to families pursuing public education. Montessori teachers foster independent learning, socialization skills and self esteem. The Montessori materials and curriculum are dynamic, hands-on and well researched. Montessori teachers receive special training to teach the use and presentation of the materials and infuse the Montessori philosophy into their teaching.

The cost of private elementary Montessori schools is prohibitive for most families. Parents who see their children thrive in a Montessori preschool want their children to continue learning in the positive, nurturing and motivating environment provided in a Montessori classroom.

My husband and I wish we could have afforded elementary Montessori schools for our own children. We believe Sonoma County can become a model for the success of a Montessori Charter school. We encourage the SCOE Board Members to show the community that the county embraces public access to education just as the county did for the Waldorf schools that are now succeeding in Sonoma County.

In closing I would like to say that I have truly been inspired by the dedication of the Board of the River Montessori Charter. I have never seen a more passionate parent group working towards the goal of providing quality education for their children as well as the county's children.

Sincerely,

Michele Barnes and Timothy Barnes

Michele and Timothy Barnes

Orchard View School is accredited by the Western Association
of Schools and Colleges.

Celeste Beck
Tree of Life Charter School
PO Box 966
Ukiah, CA 95482

Board of Education

Sonoma County Office of Education

5340 Skylane Boulevard

Santa Rosa, CA 95403

1/26/2009

Dear Members of the Board,

This is a letter in support of River Montessori Charter School's petition for approval of their charter. There are over 300 successful Montessori public schools throughout the United States. Some of these are magnet schools, some are small Montessori school districts, and many are charter schools. The school that I helped to found, and where I now work, has been successfully educating students as a Montessori public charter school in Ukiah since the 2000-2001 school year. Even though it is an intentionally small school, it regularly has test scores that rank high for our particular area and school district. But more importantly, it is a school with a high rate of family participation and support and a place where children like to come to learn.

I suspect that the River Montessori Charter School group has given you some background information on the Montessori philosophy of education, but sometimes looking at someone else's perspective and experience helps to shed additional light on a subject. Montessori schools are based on proven principles that have borne fruit in situations as different as the slums of Rome and the suburbs of Silicon Valley. Over one hundred years ago, Dr. Maria Montessori began to demonstrate that the natural curiosity of very young children could be the center of an education that effectively explores, reveals, and develops their true capacities. The wonderfully flexible educational method she developed was based not on theories or dogmatic beliefs, but on actual observation of children's real nature and activities. She filled their educational environment with materials they could discover and work with to learn. And she supplied both the guidance needed to get a child started at the right time with the right activity and the direct personal supervision needed to help the child succeed. The careful, loving observation that is the key to her method has always focused on the individual child - not on age, or on peer group, or on preconceived standards of readiness, but on seeing and respecting each and every child. It is her discoveries, updated appropriately as she anticipated, that guide our program at Tree of Life Charter School.

Our methods center on a self-pacing, sequentially organized curriculum, supplemented by experiential learning of many kinds. Instead of segregating children by age and grade, we employ multi-age groupings that resemble the groupings that occurred naturally outside of schools before our society became so fragmented and busy. These groupings correspond with demonstrated planes of human development, and give children a secure, inclusive setting for learning, as well as a sense of what's ahead for them and a chance to learn from and teach each other as they would in the larger world. The curriculum offers an overview of the development of the universe through present civilizations, to provide students a sense of how they got here and who they are. It includes a great deal of

Celeste Beck

independent research and a variety of experiential projects and exposures. Community service, democratic group government, setting and evaluating one's own goals, and exchanges with children and adults in other communities and ways of life are important aspects of learning.

Three main observations of human development form the basis of our programs: (1) that human development does not occur in a steady linear ascent but in a series of formative planes; (2) that the complete development of human beings is made possible by their tendencies to certain universal actions in relation to their environment; and (3) that this interaction with the environment is most productive for an individual child's development when it is self-chosen and founded upon individual interest. Such human behavioral tendencies as exploration, orientation, order, imagination, manipulation, repetition, precision, perfection, and communication — are present throughout life, but they don't operate uniformly in different developmental stages. This observation underlies Montessori's establishment of new divisions in education based upon the child's developmental stages, each of which requires different educational environments.

These educational environments contain three essential elements: a prepared physical environment, a prepared adult Guide, and freedom with responsibility. By changing the focus of each of these elements in the different planes of development, the educational environment allows for and supports the changing needs and interests of the child as s/he develops. The educational environment includes the family and the home environment as well as the school. Parents/Guardians are involved in the children's learning as their first teacher, regularly receiving parenting education through meetings, newsletter articles, and our parenting library. Their involvement at the school helping with classroom activities, maintenance, and fundraising lets the children know that education and school are important. What is especially striking is that as children grasp concepts and master skills in this prepared environment, they become not only more adept and confident, but more loving and peaceful as their inner lives unfold as well.

The classroom-based learning environment is filled with didactic materials for the children's use in an experiential way. Trips for going out to explore the larger world provide varied settings for exploration and instruction. Small group and individual lessons are the primary method of introducing students to a topic or skill, which each child practices and reinforces until mastery. Secondary Level instruction includes seminars, discussions, and demonstrations with follow-up activities, assignments, and projects. Encouraging children to learn at their own pace allows time for those who need extra time and help for mastery, and allows those who master skills quickly to proceed to the next challenge. Large group lessons and class meetings provide social learning, opportunities for participatory democracy, and community building.

Interestingly for me, as I was taking classes to get my teaching credential several years ago at Sonoma State University, all of the features that I previously mentioned about Montessori environments and teaching were exactly what were promoted as "best practices" in my education classes. However, most of the students in those classes felt that, if they were ever to use those methods in the traditional schools where they were planning to teach, they wouldn't have their jobs for long because it wasn't the way schools were run. I felt very fortunate that I worked in a school where "best practices" were the norm.

Celeste Beck

So, I hope you will take into consideration the many successful Montessori public schools that are currently in existence, the fact that they provide educational opportunities that are considered "best practices" by educational researchers and educational departments of universities, and the strong support of the families who want to have their children attend River Montessori Charter School as evidence that Montessori is and can be a successful model in the public school arena.

Please feel free to contact me at 707-462-0913 or celestebeck@pacific.net if you have questions.

Sincerely,

Celeste Beck

Lead Teacher/Principal
Tree of Life Charter School

RECEIVED

DEC 16 2008

December 13, 2008

Superintendent Wong
& SCOE Board Members
5340 Skylane Blvd.
Santa Rosa, CA 95403-8246

SCOE
SUPERINTENDENT

Dear Sonoma County Board of Education Members and Superintendent Wong,

I am a resident of Petaluma and urge you to approve the charter application of River Montessori Charter School. I believe the Montessori approach to teaching and learning provides the structure to deliver the kind of individual-based education experience that many Sonoma County families desire for their children.

I have two children who attended a Montessori preschool in Petaluma. Their experiences were rich and differentiated to their individual learning styles and changing interests. They loved going to school and looked forward to attacking the "work" that awaited them each day. Sometimes they would choose to repeat a work from the previous day, exploring it at a deeper level. Sometimes they would choose a brand new work that had intrigued them while they observed a classmate tackling it. And sometimes their teacher would guide them toward works she thought would help them draw connections between new concepts just introduced. While the teacher determined the themes, concepts, and lessons available in the classroom, to the students, each day's experience was self-designed - the things they learned, the way they learned, and the pace at which they learned.

Contrast that to today's traditional classroom, where much of the curriculum is taught in one way, at one speed, to all students at the same time. With the tremendous diversity of our student population, across learning styles, aptitudes, maturity levels, attention spans, languages, and home support, it is an awesome task for a teacher to be able to meet each student at their own individual level and keep them interested and challenged. The Montessori approach, teaching methodology, and classroom materials together provide an environment where the individual student is an active participant in determining the content, mode, and depth of their learning experience each day. The self-directed, individualized nature of this learning process keeps the students engaged and delighting in discovery and new understanding.

I believe this is a critical time in our public education system where new ideas and alternative models should be encouraged and explored. For many of our schools, it seems like the mandates of No Child Left Behind have forced them to direct a disproportionate level of resources to the segment of students struggling at a Basic and Below Basic level. The goal is admirable, but there is a cost.

Many children at or above the Proficient level are not receiving instruction that challenges or engages them. This is a shame. Why does there need to be a trade-off?

Montessori is a sound and proven education model that is inherently designed to provide individualized instruction and self-paced, self-directed learning for all students. I would love to see it offered as a public school option in Sonoma County, available to all children in our community. River Montessori Charter School represents a real opportunity for making this happen and I believe it would be a great asset to our county and to our children.

Please vote in favor of River Montessori Charter School.

Sincerely,



Lyn Van Tighem
1729 Clairmont Court
Petaluma, CA 94954

River Montessori

Fri Dec 5 09:58:37 2008

From: mstevens@sbcglobal.net

To: mwallace@scoe.org

Cc: generte2@comcast.net

Dear Maureen,

My name is Mary Evans and I've been diligently sending in my letters of support for River Montessori over this last year. I understand there is a meeting this coming Monday night and regretfully I will not be able to attend. I wanted to let you know that even though I have another appointment that night, my support for River Montessori is just as strong as it has always been. Petaluma needs a Montessori charter school. I understand there are always going to be politics, however, I strongly urge the school board to set them aside and consider what is best for the town and our children. One day these kids are going to be in charge and as I get older I know I will feel much better knowing that I was able to have my child go to a school where I knew the education he received was top quality. If we don't demand high levels of excellence for our children when they are young where education is concerned, we are only going to mold them into sub-par adults. As most parents, I only want the best for my child. I have been to the charter school in Sonoma, Ca., and I've seen the program they have developed. There elementary children are testing higher than any other school in the valley and there exit exam was modeled by Sonoma Valley High School for their seniors. I understand that River Montessori is adopting similar philosophies to that of the Sonoma Charter School. Petaluma is a great town and I love living here. Please vote yes on River Montessori so our town can have another great school to offer it's residents!

Sincerely,
Mary Evans
(707) 765-1064

December 12, 2008

Dear Sonoma County Board of Education Member and Superintendent Wong,

I am the mother of a bright, 5 year-old child, and I am a supporter of River Montessori Charter School. I deeply desire to have the school as an educational option in Sonoma County.

As a parent, it is frustrating to be financially unable to continue to provide my child with the Montessori environment I know she flourishes in. Montessori is a sound educational model, which is largely only currently available to parents willing and able to pay for its benefits through a private school.

After experiencing, first-hand, the Montessori model at the Pre-K and Kindergarten level, I can attest to how it has nurtured my daughter to be self-paced and independent. As a result, my child has a love of learning and I want her to continue to grow into a lifelong learner.

The Montessori method promotes compassion and cooperation, and encourages social responsibility and peace. An authentic and comprehensive Montessori educational program is a proven successful educational model and one followed in many private institutions throughout the country. I would love to see this educational option brought to our Sonoma County public school district.

I know the group of parents, community members, and educators who are founding River, are devoted, capable, and passionate about ensuring its success. They are open, determined, and ready to negotiate a Charter School agreement that will benefit everyone involved, especially the children.

As you contemplate how you will vote, please keep in mind that River Montessori Charter School intends to support the educational goals of SCOE, and **I want this educational option for Sonoma County children!**

Your vote to add River Montessori Charter School to the educational options of parents and children will not only satisfy the educational needs of my child, it will enhance the educational standing of Sonoma County schools and be an asset to Sonoma County for years to come.

Please, vote in favor of River Montessori Charter School and say YES to the opportunity to enrich the educational opportunities for our youth!!!!

Sincerely,

Darlene Woodcox
7473 Maximillian Place
Rohnert Park CA 94928

January 24, 2009

Dear Sonoma County Board of Education Member and Superintendent Wong,

We are writing in support of River Montessori Charter School. Our family has been active in fundraising and other pursuits towards this effort since 2007 and have found the people behind it to be highly capable and unwavering in their dedication.

Our 7 year old son, has attended Montessori schools since age 2 and has flourished both academically and socially. While our son's education is of the utmost importance to us, it has been a major investment that we can no longer afford. We feel the primary goal of this charter is to provide the opportunity of a Montessori education to all families, no matter their financial circumstances. In essence, bring it to the masses and break the class barriers.

There are currently several public Montessori elementary schools throughout the State of California. All of these schools successfully meet State requirements. Here in Sonoma County, there are numerous Montessori pre-schools in addition to 2 private Montessori elementary schools in Petaluma and Santa Rosa. This clearly demonstrates a demand for Montessori education in our area. In addition, the more options available to families in the public system draws more people to the area benefiting the local economy with increased home sales and tax revenue.

We urge you as individuals dedicated to ensuring an excellent quality of education for the families of Sonoma County to approve this charter. We appreciate the effort on the part of S.C.O.E. and the Board in considering this charter and thank you for your time.

Sincerely,

Mary Jane Salberg & John Campbell

302 W. Sierra Ave.

Cotati, CA 94931

707-664-8235



December 2, 2008

Red Barn
MONTESSORI

Dear Sonoma County Board of Education and
Superintendent Wong,

I have been a member of the Petaluma community for 26 years. I have been a Montessori teacher in the community since 1989.

On April 10, 2006 some of the same parents who are starting River Montessori Charter School started Red Barn Montessori with myself and two other Montessori teachers. Red Barn is a non-profit pre-school and kindergarten program. We are small but very successful with over 45 years of Montessori training in our staff.

My daughter went to Montessori School from age three years through 6th grade. She thrived there, however I could not afford to send her to the very school I worked at for 20 years. She was blessed with a grandmother who paid for her Montessori education.

It has always been my dream as a parent and educator that children in our community, would have an opportunity to continue their early Montessori



education through elementary and even beyond, FREE.

Maria Montessori would not want the schools with her name on them to only be accessible to those who could afford them. She began her first school with the children of the slum tenements of Rome.

Montessori schools have a history of success with students. Although the philosophy is 100 years old, it is the wave of the future to produce life long learners who are motivated from within and work well with others while maintaining their individuality.

I urge you to support the creation of River Montessori School, which would make Sonoma County a leader in progressive education.

Sincerely,

Andrée M. Young

Please forward to the Board Members and to Carl Wong, Superintendent Sat Jan 24 14:18:31 2009

From: cchrentz@juno.com
To: mwallace@scoe.org
Reply-To: cchrentz@juno.com
Attachments: ca.ed.stats1.doc (60KB)

January 24, 2009

Dear Sonoma County Board of Education Board Members
and Superintendent Carl Wong,

For 2 years I have worked, voluntarily, with a group of more than one hundred people to create River Montessori Charter School. I have done this in addition to being a mother and grandmother, working as a Critical Care RN and Family Nurse Practitioner, functioning as teacher to my son who is home-schooled.

We began this process because we believe in the charter school option as our legal right. We began it because it is the only hope for us to be able to offer a model of education to our children that we have seen, with our own eyes, bring our children both joy and academic success.

We know that there are more than 14 Public Montessori schools already functioning in California. Montessori is successful for a diverse group of children, with differing abilities and socio-economic backgrounds. In January 2007, *The Washington Post* published an article titled "Montessori, Now 100, Goes Mainstream".^[1] The article discussed the increasing number of Montessori public school programs, particularly in African American communities.

Once a maverick experiment that appealed only to middle-class white families, Montessori schools have become popular with some black professionals and are getting results in low income public schools with the kind of children on which Montessori first tested her ideas.

The article goes on to discuss how Montessori has been implemented in the public schools, and has become an attractive option to black, middle class parents because it provides an alternative to the "No Child Left Behind" strategies in most current public school curricula.

So, the marriage of Montessori with the Public arena has already been proven. We also know that California is a state that falls behind in education. Less money is spent on children's education in California than the national average. California's classrooms are taught with larger ratios of children to teachers and our educators have less education than the national average. (see attached)

FEB. 11. 2009 11:33AM

Superintendent of Schools

NO. 7659 P. 18

Charter schools are the hope to discover models of education for children who may learn differently. They are an opportunity to explore new models that may turn out to be the hope for many children who are not being served by the conventional classroom.

No Child Left Behind has indeed, left many children and teachers and schools behind. This failing policy has attached dollars to test scores and has placed pressure on our most vulnerable schools. It is one of many contributing factors to why California Public Schools are failing to educate our children. Charter Schools help to relieve the damage by opening a space, with money set aside by the state for this purpose, to offer another option.

The time has come for us to embrace our future again with new hope. River Montessori Charter School is the hope of many of your constituents, parents, children and educators. I urge you to vote "Yes!" on February 5, 2009.

Sincerely,

Cindy Lohrentz
Mom, Grandma, River Board Member

I am using the Free version of SPAMfighter
We are a community of 5.9 million users fighting spam.
SPAMfighter has removed 445 of my spam emails to date.
The Professional version does not have this message

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Income and Poverty by state

	California	Texas	New York	New Mexico	U.S.
Median household income, 2004-06	\$53,770	\$43,425	\$48,201	\$40,827	\$47,790
Percent of public school students receiving free/reduced lunch, 2006-07	49.7%	47.3%	43.8%	60.7%	41.4%

Income Source: Digest of Education Statistics: http://nces.ed.gov/programs/digest/d07/tables/dt07_020.asp. Free/reduced lunch Source: National Center for Education Statistics. <http://nces.ed.gov/nationsreportcard/states/profile.asp>

Expenditures per pupil by state, 2004-05

	California	Texas	New York	New Mexico	U.S.
Total (current, capital, interest)	\$9,655	\$8,891	\$14,689	\$9,368	\$10,071
Current expenditures	\$7,905	\$7,246	\$13,703	\$7,834	\$8,701
Instructional expenditures	\$4,798	\$4,324	\$9,425	\$4,387	\$5,321

Expenditures per pupil in fall enrollment in public elementary and secondary education, by function and state or jurisdiction: 2004-05. Source: National Center for Education Statistics. <http://nces.ed.gov/nationsreportcard/states/profile.asp>

Teacher and Classroom Characteristics, 2003-04

	California	Texas	New York	New Mexico	U.S.
Percent of Teachers with Masters or PhD	33.1%	23.4%	69.2%	36.8%	42.1%
Average class size, elementary	21.7	18.7	19.8	18.2	20.4
Average base salary, elementary and secondary teachers with bachelor degree and two or fewer years experience	\$38,920	\$33,440	\$37,410	\$28,830	\$32,230

Source: National Center for Education Statistics. <http://nces.ed.gov/nationsreportcard/states/profile.asp>

Fourth-Grade Educational Proficiency by State

	California	Texas	New York	New Mexico	U.S.
4 th Graders who are at or above Basic Level national norm in Math (2007)	70%	87%	85%	70%	81%
4 th Graders who are at or above Proficient Level national norm in Math (2007)	30%	40%	43%	24%	39%
4 th Graders who are at or above Basic Level national norm in Reading (2007)	53%	66%	69%	58%	66%
4 th Graders who are at or above Proficient Level national norm in Reading (2007)	23%	30%	36%	24%	32%
4 th Graders who are at or above Basic Level national norm in Science (2005)	50%	66%	n.a.	55%	66%
4 th Graders who are at or above Proficient Level national norm in Science (2005)	17%	75%	n.a.	18%	27%

Source: Kids Count Data Center, as measured and defined by the National Assessment of Educational Progress (NAEP). <http://www.kidscount.org/datacenter/>.

letter from Dixon Montessori Charter School

Tue Feb 3 12:15:25 2009

From: cnyln63@yahoo.com

To: mwallace@scoe.org

Reply To: cnyln63@yahoo.com

Dear Members of the Sonoma County Board of Education,

Dixon Montessori is a charter school that uses a Montessori model of instruction while also adhering to California State Standards. We have found this is possible by making the state standards our guide for year long instruction and using Montessori materials to teach the content that students are expected to master.

The Montessori math materials prepare students to meet or exceed grade level standards. We use Montessori language materials with our students also, but have found it necessary to use additional curriculum to support reading comprehension in the primary grades.

The staff at Dixon Montessori has identified that our students need additional support in mastering the language of the state test. We have identified certain terms that are not typically used in a Montessori program and make certain that students are familiar with these words. We use Curriculum Associates testing in the Spring and Fall to give our students practice with the format of a standardized test. The information we gain from these tests is then used to guide instruction for individual students and form intervention groups as necessary.

We have found that it is possible to provide a Montessori education that is in harmony with state standards for instruction. Dixon Montessori has provided an attractive alternative to traditional education for area families. The school has grown from a student body of 36 students in its first year to 177 students in the current year. We have a wait list of 35 student and 61 families who have requested enrollment packets for the 2009-2010 school year.

Regards,

Carolyn Pfister

NOTE YES for awarding a Charter to River Montessori

Thu Feb 5 14:05:13 2009

From: Hagler@superhealth.org

To: pbernstein@scoe.org; mwallace@scoe.org

February 5, 2009

Maureen - Thank you for sharing with the Board members.

I hope to be there for your vote this evening!

In these tough times I still find it absolutely necessary to continue my child's Montessori education and I am enrolling my daughter at Spring Hill Montessori for Kindergarten this year instead of the local school district in Petaluma. I will be spending approx \$900 per month for four days per week at Spring Hill. Spring Hill Montessori extends through the sixth grade but I am not excited about the prospect of spending all this hard earned money for a private Montessori education when a Charter School Montessori is just around the corner for her when she is ready for the 1st grade. She needs this school. I want this school. **Please vote YES!**

We need your vote to make our dream become a reality for our children, our city and our district. I hope that you can see the value this school will add to the district. Many Petaluma parents want a free charter Montessori school as an option for their children beyond Pre-K / K. There is a private elementary Montessori school in town but it is difficult for many families to send their children to a private school where they would be spending upwards of \$10K per year per child for that option.

We want more choices for Petaluma parents for their children's education. Just as you like to have a choice to shop at Safeway or Nob Hill or Oliver's or Ralphs we want more choices for our children. A FREE Montessori education is a golden opportunity to bring more families to Petaluma and Sonoma County. More families means more dollars spent in the community as

well. It is wonderful that there are already the choices of traditional public schools as well as the Live Oak Charter School and the Cherry Valley Charter School but those do not follow the Montessori philosophy so many of us have come to embrace with our children.

Please, Vote YES for River Montessori Charter School. Southern Sonoma County residents deserve and expect greater choices in their selection for their child's education. This school will bring additional students to the district. It will bring an additional sparkle to the OAUSD in the eyes of other school districts. We will make the district, city and county proud to have voted YES to bring our school to the residents of Petaluma and Sonoma County.

Thank you!

Jennifer Haslet
513 Ely Blvd South
Petaluma, CA

FEB. 11. 2009 11:27AM

Superintendent of Schools

SCOE Board of Education - Public Comment on River Montessori Thu Feb 5 08:44:54 2009

From: Betty Li <betty@hotmail.com>
To: mwallace@scoe.org

Dear Sonoma County Board of Education and County Superintendent,

It's come to our knowledge that the recommendation from staff is to deny River Montessori Charter school based on questioning the curriculum and whether the Montessori approach can meet state standards. If you look at the test scores for other Montessori charter schools, it would be apparent that the Montessori approach meets state standards, and exceeds the scores of numerous schools in Sonoma County. There's no question that with over 90 signatures pledging for the school, there will not be an issue of enrolling 100 children the first year. Once the charter is approved, I can guarantee that there will be even more momentum and interest for enrollment and seeing this school become a reality. People are looking for alternatives, and with larger classroom sizes slated in our public schools, this school is vital. If River is not approved, I know that we, as long as many others, will be looking into private schools, as the public schools that you represent, are not meeting the needs of our children.

Sincerely,
Betty Li
615 Liberty St.
Petaluma, CA 94952

 **EMAILING FOR THE GREATER GOOD**
[Join me](#)

Notice to Recipient:

NO. 7659 P. 5

Public Comment River Montessori
 From: ec9065@yahoo.com
 To: mwallace@scoc.org
 Reply To: ec9065@yahoo.com
 Thu Feb 5 09:02:46 2009

Dear Sonoma County Board of Education and County Superintendent,
 It's come to our knowledge that the recommendation from staff is to deny River Montessori Charter school based on questioning the curriculum and whether the Montessori approach can meet state standards. Based on your staff's recommendation I would like to see where they based this information and what objective material they used to decide that the Montessori approach would be a failure for Sonoma County. If you look at the test scores for other Montessori charter schools, it would be apparent that the Montessori approach meets state standards, and exceeds the scores of numerous schools in Sonoma County. If you could please email me their research since at this time based on the information of those who have tirelessly fought for this school it does not match the information that they have come up with. Also concerning the enrollment, there's no question that with over 90 signatures pledging for the school, there will not be an issue of enrolling 100

children the first year. Once the charter is approved, I can guarantee that there will be even more momentum and interest for enrollment and seeing this school become a reality. People are looking for alternatives, and with larger classroom sizes slated in our public schools, this school is vital. If River is not approved, I know that we, as well as many others, will be looking into private schools, since the public schools that you represent, are not meeting the needs of our children. Also note that as we move into private schools, this will further lower your enrollment meaning as you well know (or even care) less public dollars coming to the Sonoma County School District.

Sincerely,
 Glenn Kircher
 615 Liberty St.
 Petaluma, CA 94952

 Notice to Recipient:

Information contained in this message may be privileged, confidential and



RESOLUTION No. 012-08-09
Sonoma County Board of Education
Action Regarding Appeal by the River Montessori
Charter School Petitioners

WHEREAS, a founding group of individuals filed a Petition to form the River Montessori Charter School with the Old Adobe Union School District (herein after referred to as District) and that petition was denied on or about October 13, 2008, and

WHEREAS, the Petitioners for River Montessori Charter School submitted an appeal before the Sonoma County Board of Education on or about December 2008, and

WHEREAS, the Sonoma County Board of Education held a public hearing on the Charter School appeal in accordance with Education Code Section 47605 on December 8, 2008, and

WHEREAS, the Sonoma County Board of Education appointed an ad hoc committee of 3 of its seven members to conduct an extensive de novo review of the petition and all documents attached to the Petition, including Appendices A-M inclusive and the Petition signatures, and

WHEREAS, in accordance with County Board policy the review was limited to the petition that was submitted to the District except that certain changes and/or additions were authorized to meet the requirements of County Board policy specifically a new special education plan and a revised budget to meet the special education adjustments and changes in the 08-09 State budget as approved by the Governor in September 2008, and

WHEREAS, the ad hoc committee of the County Board met with Petitioners to review questions and obtain clarification of the Petition documents;

WHEREAS, charter schools are exempt from many of the laws governing school districts, but they are accountable for complying with the terms of their charters and applicable law; and

WHEREAS, Education Code section 47605(b) charges a county governing board with the responsibility of reviewing charter petitions that were denied at the district level to determine whether they meet the legal requirements for a successful charter petition; and

WHEREAS, school agencies on review of a petition shall give preference to petitions that demonstrate the capability to provide programs for academically low achieving students; and

WHEREAS, a successful charter petition must contain reasonably comprehensive descriptions of the criteria set forth in Education Code section 47605(b)(5)(A)-(P), as well as the affirmations and other requirements set forth in Education Code section 47605; and

WHEREAS, a governing board may deny a petition to form a charter school if it makes written findings to support any of the following under Education Code section 47605(b): "(1) The charter school presents an unsound educational program for the pupils to be enrolled in the

charter school; (2) The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition; (3) The petition does not contain the number of signatures required by [the statute]; (4) The petition does not contain an affirmation of each of the conditions described in subdivision (d); and (5) The petition does not contain reasonably comprehensive descriptions of all of the [criteria set forth in Education Code section 47605(b)(5)(A)-(P).]"; and

WHEREAS, the River Montessori Charter School proposes to be a Montessori based school to serve grades 1-4, with an initial enrollment of 100 students during its proposed first year of operation during the 2009-2010 school year, and a projected enrollment of 190 students in grades 1-5 by year five; and

WHEREAS, the County Board of Education, under Education Code section 47605(b), is obligated to take action to grant or deny the Petition within 60 days of its submission;

NOW, THEREFORE, BE IT RESOLVED, that the Sonoma County Board of Education makes the following findings:

1. With Respect to Petition Signatures

- a. Upon appeal, Petitioners submitted additional signatures beyond those submitted to the District. This additional set of signatures was not part of the Petition submitted to the District and therefore was not considered or reviewed at the District level. In accordance with County Board policy, this additional set of signatures will be disallowed and not part of the County Board review. The original signatures submitted to the District were sufficient to meet legal requirements.

2. With Respect to Educational Issues and Program Description

- a. The Petition draws parallels with the Montessori teaching program and specific Montessori activities, but it is difficult with this Petition to adequately assess the completeness of the program in relation to the California Standards. Review of pacing guides provided determined that not all content standards are addressed.
- b. The Petition lacks a reasonably comprehensive plan for on-going monitoring of student progress in all grades beyond the normed and criteria referred summative assessments.
- c. The Petition focuses on teacher observation of Montessori activities and does not include benchmark or formative measures which would inform instructional practices and cause initiation of intervention strategies.
- d. The Petition's plan to educate EL students lacks sufficient detail regarding the instructional strategies and process for EL instruction, including

placement, evaluation, and re-designation. In addition, the Petition and clarification fails to identify and acknowledge duty to provide daily instruction of English.

- e. The Petition's proposed plan for low-achieving or at-risk students lacks sufficient detail regarding standards for identification, benchmark or formative assessments and intervention, particularly for those students who are not identified with special needs. It is unclear what types of diagnostic assessments will be used, and the Petition provides no information that they will have staffing who are eligible or appropriate to conduct and analyze such diagnostic assessments. (Education Code § 47605(b)(5)(A-C).)
- f. The Petition fails to address the potential difficulties created by students whose disabilities require instruction other than by the Montessori method, often in smaller learning environments, and/or as mandated by federal and state special education laws. The Petition strongly suggests that a special education student's unique needs will be driven by the Charter's pedagogical approach rather than the prescribed mandate in special education laws.
- g. The Petition fails to contain sufficiently defined measurable pupil outcomes specific to core content knowledge skills "in accordance with all state of California published standards" (County Appeal of River Montessori Charter School Petition, p. 25). Instead, the Petition identified ten attributes.

3. With Regard to Governance Structure

- a. Petition defers to the Bylaws to describe in large part the governance structure of the charter school. The Bylaws allow significant changes by modification of the Bylaws. Thus material changes could be made without submission to the charter granting authority. The Bylaws and Petition do not confirm that an approved charter is a binding document and that the charter needs to contain the elements of governance and cannot be changed by action to change the Bylaws of the corporation.
- b. The Bylaws contain a provision authorizing the Governing Board to delegate the management of the charter school to a third party management company. Again, the Petition does not provide a comprehensive description of governance.
- c. The charter Petition states that the charter school Board will comply with conflict of interest statutes applicable to school district Board members, but the Bylaws contain provisions that are inconsistent with these statutes.

- d. In violation of law, the Petition authorizes the Board of Directors to have contracts with the charter school.
 - e. With regard to the charter school Principal/Director, the Petition authorizes that the duties of that position may be delegated or contracted out.
 - f. The Petition notes the authority of the Board to delegate responsibilities including development, approval, modification and review of the budget. Thereby limiting public review and comment on charter school operation and distancing the operation of the charter school from the monitoring authority.
 - g. The Petition does not reflect an understanding and charter school commitment to compliance with the Brown Act. For example, the Bylaws create an executive committee. There is no commitment that this committee, which will have full authority to operate the charter, will act in compliance with the Brown Act. There are other indications in the Petition that closed sessions may be held for non compliant reasons.
 - h. The Bylaws submitted to the District and in the appeal do not align with the charter Petition and in several parts either conflict with or are not consistent with the charter. Petitioners subsequently submitted an alternative set of Bylaws that were not submitted to the District and therefore not considered by the District. In accordance with County Board policy, this new set of Bylaws is disallowed and not considered part of the County Board review.
4. With Regard To Employment Issues
- a. The Petition indicates a plan to hire properly credentialed staff for core positions. However, the job specifications detailed later in the Petition do not support this intent. (Education Code § 47605(b)(5)(E).)
 - b. The Executive Director/Principal is not required to have school experience, is not required to have a teaching credential, and is not specifically required to have an administrative credential. (Education Code § 47605(b)(5)(E).)
 - c. The Petition indicates an intent to “recruit qualified personnel to serve in administrative, instructional, instructional support, and non instructional support capacities that will reflect the ethnic and racial demographic of the student body. This is an illegal hiring practice.
5. With Regard to Student Issues

- a. It is unclear whether there is a criteria for admission and continued enrollment. (Education Code § 47605(b)(5)(H).)
- b. The Petition suggests that there are admission criteria in that on page 3, it states "that the charter school is particularly interested in attracting students who hold the following characteristics:"
 - a. The interest and motivation to be educated in the Montessori approach,
 - b. The ability and capability to work independently.
 - c. The propensity to be self-motivated in learning and achievement.

It is not clear how these criteria will be measured/assessed and recruited. (Education Code § 47605(b)(5)(H).) Furthermore, it is concerning that such criteria would have an adverse impact on recruitment of students that is reflective of District population.

- c. The Petition does not provide an adequate description of a program that will have the effect of recruiting students that are reflective of the District population. Population information indicates that 32.2% of the population is Hispanic, 30.1% English Language learners and 32.0% low economic. The Petition does not contain any proactive efforts to recruit a diversified population.
- d. The charter Petition indicates an intention to discipline students for attendance issues and also indicates that reasons for discipline may change thereby raising issues of due process and the incompleteness of the Petition description. (Education Code § 47605(b)(5)(J).)
- e. The discipline procedure fails to limit jurisdiction to only those acts related to school activity or school attendance. This raises a due process concern. Also parent volunteer forms do not indicate that students will not be exited if a parent fails to meet their volunteer commitment.
- f. The Policy does not contain a reasonably comprehensive description of procedures where discipline results in a change of placement for a child with a disability.
- g. The Policy does not provide a reasonably comprehensive description of interim alternative educational settings for students subject to suspension/expulsion.

6. With Regard to Budget and Facility Issues

- a. Overall, it does not appear that the budget is sufficient to support the intentions, goals, and design of the proposed charter school.

- b. The adequacy of the budget for facilities cannot be determined or confirmed because the facility components and location have yet to be determined.
- c. Separate from cost related impact, the Petition fails to identify the location and/or the possible options for a location for the charter school. Further more, the Petition fails to identify attributes of a location that are necessary to the implementation of a charter school. (Education Code section 47605(g)).
- d. The budget contains an unsubstantiated projected first-year enrollment of 100 students. Using the County's fiscal procedures and standards and validating the District's fiscal procedures and standards, staff assumed that the charter school's enrollment to be 72 students in year one, increasing by 20 students in the subsequent two years. Even adjusting the charter school's expenses based on this revised assumption, the County projects that the charter school would incur a deficit in net revenue of \$31,149 in year one, \$132,772 in year two, and \$239,376 in year three. The County was generous in its budgetary assumptions in that it utilized the Petitioner's full assumptions regarding the receipt of State and Federal grants, even though the Petitioners did not provide the requisite documentation verifying that such funds had been committed. The Petitioner's budget did not include any alternative or contingency plans if these sources of funding did not materialize.
- e. The budget presented to the District included \$350,000 in planning grant funds. The budget presented to the County included \$500,000 in planning grant funds. This additional funding was not part of the Petition submitted to the District and therefore was not considered or reviewed at the District level. In accordance with County Board policy, this additional finding is disallowed and not considered part of the County Board review.

THEREFORE, based on the above findings, individually and collectively, the Sonoma County Board of Education makes the following conclusions in accordance with Education Code section 47605:

1. The charter school presents an unsound educational program for the pupils to be enrolled in the charter school; and
2. The Petitioners are demonstrably unlikely to successfully implement the program set forth in the Petition; and
3. The Petition does not contain reasonably comprehensive descriptions of all required elements of Education Code section 47605.

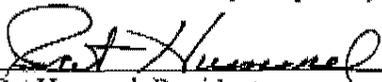
THEREFORE, based upon the above findings and conclusions, the Board denies the Petition.

The foregoing Resolution was adopted upon motion of Trustee Bosworth, seconded by Trustee Wolf, at a regular meeting on this 5th day of February 2009, by the following vote:

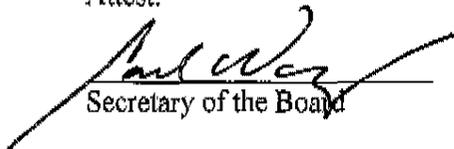
Trustee Bantis	<u>Aye</u>
Trustee Bosworth	<u>Aye</u>
Trustee Hummel	<u>Aye</u>
Trustee Kaufman	<u>Aye</u>
Trustee Peterson	<u>Aye</u>
Trustee Willbanks	<u>Aye</u>
Trustee Wolf	<u>Aye</u>

AYES: 7 NOES: 0 ABSENT/NOT VOTING: 0

I hereby certify the foregoing to be a full, true, and correct Resolution duly adopted by the Sonoma County Board of Education.


 Pat Hummel, President
 Sonoma County Board of Education

Attest:


 Secretary of the Board

1.

CERTIFICATION OF COMPLIANCE WITH APPLICABLE LAW
California Code of Regulations, Title 5, Section 11967(b)(3)

A charter petition that has been previously denied by the governing board of a school district may be submitted to the county board of education or the State Board of Education. See Education Code Section 47605(j)(1). As per Education Code Section 47605(j)(5), the State Board of Education has adopted regulations implementing the provisions of Section 47605(j)(1). See Title 5, California Code of Regulations Section 11967 (5 CCR Section 11967).

5 CCR Section 11967 requires that a charter school petition that has been previously denied by a county board of education must be received by the State Board of Education not later than 180 calendar days after the denial. 5 CCR Section 11967(a). In addition, subdivision (b)(3) of Section 11967 requires the charter petitioner to provide a "signed certification stating that petitioner(s) will comply with all applicable law" when submitting the denied petition to the State Board of Education.

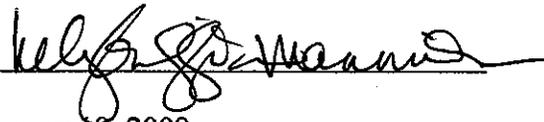
The following certification is submitted in compliance with 5 CCR Section 11967(b)(3).

Certification

By signing below, I certify as follows:

1. That I am the lead petitioner, and that I am competent and qualified to certify to the facts herein;
2. That, as lead petitioner, I have personal knowledge of the facts forming the basis of this certification;
3. That I make this certification for purposes of 5 CCR Section 11967(b)(3) only; and
4. That the charter petitioner(s) and the charter petition are in compliance with applicable law.

Name: Kelly Griffith Mannion, Lead Petitioner

Signature: 

Date: February 10, 2009

School Name: **River Montessori Charter School**



LAW OFFICES OF MIDDLETON, YOUNG & MINNEY, LLP

MARCH 25, 2009

PAUL C. MINNEY
JAMES E. YOUNG
MICHAEL S. MIDDLETON
LISA A. CORR
AMANDA J. McKECHNIE

State Board of Education
California Department of Education
Charter Schools Division
1430 N Street
Sacramento, CA 95814

VIA: HAND DELIVERY

JESSICA ADAMS ROBISON
JERRY W. SIMMONS
CHASTIN H. PIERMAN
JULIE D. ROBBINS
JAMES L. SHEA
KIMBERLY RODRIGUEZ
ANDREA C. SEXTON
SARAH J. KOLLMAN
JANELLE A. RULEY
ANDREW G. MINNEY

***RE: Description of Changes to the River Montessori Charter School
Petition Necessary to Reflect the State Board of Education as the
Chartering Entity***

Dear Members of the State Board of Education:

The River Montessori Charter School (the "Charter School") charter petition was submitted to the Old Adobe Union School District (the "District") on August 15, 2008. The District voted to deny the petition on October 13, 2008. The Charter School submitted an appeal petition to the Sonoma County Board of Education (the "County") on November 11, 2008. The County voted to deny the charter petition on February 5, 2009.

The Charter School respectfully submits its charter petition as an appeal to the State Board of Education ("SBE"). We have listed below the relevant and appropriate changes to the charter petition which are necessary to reflect approval by the SBE:

1. Chartering Authority

Any text referring to the "Old Adobe Union School District," "OAUSD," or the "District" as the chartering authority would be revised to read "State Board of Education" or "SBE."

2. Special Education Plan

Instead of acting as a public school of the District for purposes of special education, the Charter School will be its own local educational agency ("LEA") and will apply directly for membership in the Sonoma County Special Education Local Plan Area ("SELPA"). Should the Charter School be denied membership in the Sonoma County SELPA, it will apply for membership in the El Dorado County Charter SELPA.

OF COUNSEL
SUZANNE A. TOLLEFSON

3. Dispute Resolution

The Dispute Resolution language in the charter petition will be followed by the paragraph below:

“The Charter School recognizes that, because the SBE is not a local education agency, the State Board of Education may choose to resolve a dispute directly instead of pursuing the dispute resolution process specified in the charter, provided that if the State Board of Education intends to resolve a dispute directly instead of pursuing the dispute resolution process specified in the charter, it must first hold a public hearing to consider arguments for and against the direct resolution of the dispute instead of pursuing the dispute resolution process specified in the charter.”

* * *

We will make every effort to submit any supplemental documentation that the SBE may request in a timely manner.

Sincerely,
LAW OFFICES OF MIDDLETON,
YOUNG & MINNEY, LLP


LISA A. CORR
ATTORNEY AT LAW