

Sonoma Charter School

Regular Governing Board Meeting Agenda

Wednesday, September 13, 2023

6:00 p.m. Open Session

Meeting will be accessible at school – Room 7, Sonoma Charter School

17202 Sonoma Highway, Sonoma, CA 95476

OR

Join Zoom Meeting

<https://us06web.zoom.us/j/2176952793?pwd=FmpjaWgebB28wwBZXKGLrCrHknkodW.1>

Meeting ID: 217 695 2793 Passcode: x4rPsF

Sonoma Charter School adheres to the Americans with Disabilities Act. Should you require special accommodations, or more information about accessibility, please contact us at 707-935-4232. All efforts will be made for reasonable accommodations.

Welcome to our Board meeting. Documents provided to a majority of the Governing Board regarding this agenda will be made available for public inspection in the School Office located at 17202 Sonoma Hwy., Sonoma, CA 95476 during normal business hours. Such writings and documents are posted on the School's website at <https://www.sonomacharterschool.org/> as well as on ParentSquare, and clicking on Board of Education. A file copy is also available in the the meeting room. Said file is not to be removed from the room.

AGENDA

5:00 p.m. CLOSED SESSION

CALL PUBLIC MEETING TO ORDER, ESTABLISH QUORUM

I. PUBLIC COMMENT - Opportunity for public to comment on Closed Session items(s).

The Board recognizes the value of public comment on educational issues and provides this time for members of the audience to address the Board on **any item to be disclosed in closed session**. Each speaker is requested to identify themselves prior to addressing the Board and to limit comments to three minutes.

II. CLOSED SESSION - Recess to Closed Session – Board to consider and/or take action on any of the following:

PUBLIC EMPLOYEE PERFORMANCE EVALUATION Gov. code §54957

Title: Principal/Director/Int. Superintendent

III. RECONVENE IN OPEN SESSION

Report action taken, if any, in Closed Session

6:00 p.m. OPEN SESSION

CALL PUBLIC MEETING TO ORDER, ESTABLISH QUORUM

I. PUBLIC COMMENT

At this point on the agenda, opportunity is provided for an individual or representative of a group to make statements to the Board regarding an item not listed on the agenda. A speaker shall be limited to 3 minutes (Board Bylaw 9323). The Board will not take action on an item introduced during this portion of the agenda as this would constitute an illegal act on the part of the Board.

II. APPROVE AGENDA

Action

III. CONSENT CALENDAR

Action

(At every board meeting, at least a few items come to the agenda that do not need any discussion or debate either because they are routine procedures or are already unanimous consent. A consent agenda (Roberts Rules of Order calls it a consent calendar) allows the board to approve all these items together without discussion or individual motions.)

A. Approval of Minutes for:

Board Meeting June 13, 2023

Board Meeting June 27, 2023

Special Board Meeting September 5, 2023

B. Approval of New Employee Hires:

Angela Farias-Martinez, Instructional Assistant; Siena Parrish, 1st Grade Teacher;

Joey Villarruel, Custodian; Victoria Wilson, Campus Supervisor

C. Approval of Governing Board Statement for District Intern Credential for Raegen

Hedley

IV. GOVERNANCE

A. Annual Organizational Meeting

1. Elect Officers

President

Action

Secretary

Action

2. Set Regular Meetings

Action

3. Adopt Resolution 01-2023/24: Board's Code of Ethics

Action

B. Governance Handbook review – 1 st Reading	Discussion
C. Brown Act Review	Discussion
D. Administrative Roles	Information
E. Salary Schedule Placement	Information
F. Charter Renewal Update	Information
G. Board Policies:	
1. Local Assignment Option Policy	Action
2. Use of Facilities	Action
V. PROGRAMS AND FINANCE	
A. Budget Update	Information
B. Approve 2022/23 Unaudited Actuals Report	Action
C. Approve 2022/23 Education Protection Account Final Expenses	Action
D. Approve 2023/24 Consolidated Application for Federal Funding	Action
E. The Big Five – Emergency Response for SCS	Information
VI. INFORMATION & REPORTS	
A. Staff Reports	Information
B. CCC Report	Information
C. Principal’s Report	Information
D. Superintendent’s Report	Information
E. Board Reports	Information

MEETING ADJOURNED AT _____

Sonoma Charter School
Regular Governing Board Meeting Minutes

Tuesday, June 13, 2023

5:00 p.m. Closed Session

6:00 p.m. Open Session

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MINUTES

5:07 p.m. CLOSED SESSION

CALLED PUBLIC MEETING TO ORDER, ESTABLISHED QUORUM

Present: Trustees Skinner, White, Elin Principal Sowers, Int. Superintendent Stone

I PUBLIC COMMENT - Opportunity for public to comment on Closed Session items(s).

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II CLOSED SESSION - Recess to Closed Session – Board to consider and/or take action on any of the following:

TO CONSIDER COMPLAINT AGAINST PUBLIC EMPLOYEE -GOV CODE SECTION 54957

III RECONVENE IN OPEN SESSION

Report action taken, if any, in Closed Session

President Skinner reported that he was directed to respond to the complaint on behalf of the Board.

6:15 p.m. OPEN SESSION

CALLED PUBLIC MEETING TO ORDER, ESTABLISHED QUORUM

Present: Trustees Skinner, White, Elin, Perkins, Aviles. Trustee Holladay joined by zoom at 6:30pm

I PUBLIC COMMENT

President Skinner made a comment on behalf of the SCS community, the Board, and the public thanking Trustee Libby White for her service on the Board through some challenging times. He presented her with a Hulk trophy.

II GOVERNANCE

- A. Approved Agenda Moved: White, Second: Aviles 5-0
- B. Approved Minutes for Board Meeting May 23, 2023 Moved: White, Second: Aviles 5-0
- C. Adopted 2023-2024 Salary Schedules Moved: White, Second: Aviles 4-1
- D. Adopted Go Math! Curriculum for use in TK-5th grades
Moved: White, Second: Aviles 6-0
- E. Reviewed Sonoma Charter's End of Year Data Report
- F. MOU with Boys and Girls Club for Providing Extended Learning Opportunities Program
Moved: White, Second: Aviles 6-0

III PUBLIC HEARINGS

- A. **Public Hearing 2023-2024 Local Control Accountability Plan (LCAP)** Opened at 7:01pm. Explanation of what the LCAP is, Closed at 7:03pm
- B. **Public Hearing for the 2023-2024 Budget** Opened at 7:04 pm, no comment, Closed at 7:05pm

IV PROGRAMS & FINANCE

- A. Budget Update provided by Jim Weber of Charter Impact. Trustee White expressed concern regarding the amount of 'surplus.' All agreed it was necessary as the state budget was not settled yet and the state may take funding back this year.

V INFORMATION & REPORTS

- A. Staff Reports- Happy that school is out! Great graduation ceremony!
- B. CCC Report – Kate Cherry, VP of CCC, reported that CCC has expanded their leadership with 2 people sharing most offices.
- C. Principal's Report - School ended successfully and we are pleased with student achievement
- D. Superintendent's Report - Concerns regarding inequity between Sonoma Charter's Facilities Use Agreement and Woodland Star's agreement are being addressed with

SVUSD. Likewise, SVUSD's failure to actively get families signed up for the Free and Reduced Lunch program caused SCS's socio-economically disadvantaged students to be undercounted. This impacts all sorts of things from program eligibility to funding. It will be rectified in the fall, but is of serious concern.

E. Board Reports – There will be a social at Belli's home on August 5th at 2pm.

MEETING ADJOURNED AT 7:35pm

Sonoma Charter School
Regular Governing Board Meeting Minutes

Tuesday, June 27, 2023

6:00 p.m. Open Session

Meeting will be accessible at school – Conference Room, Sonoma Charter School

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OR*

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MINUTES

6:00 p.m. OPEN SESSION

CALLED PUBLIC MEETING TO ORDER, ESTABLISH QUORUM at 6:05 PM.

Present: Board President Skinner, Trustees Perkins, Elin, Cannard, Holladay; Principal Sowers, Int. Sup't Stone.

- I PUBLIC COMMENT – Ms Cherry asked about TK aftercare for next year**

- II GOVERNANCE**
 - A. Approved 2023-24 Local Control Accountability Plan (LCAP) Moved: Cannard
 Seconded: Perkins, Vote: 5-0
 - B. Approved the 2023-2024 Budget Moved: Perkins, Seconded: Elin, Vote: 5-0
 - C. Approved 2023/24 Education Protection Account Spending Plan Resolution
 Moved: Cannard Seconded: Holladay, Vote: 5-0

- III INFORMATION & REPORTS**
 - A. Staff Reports: None other than looking forward to Summer Break
 - B. CCC Report: Krissy Kyjovsky thanked outgoing Presidents Kristen and Kimmy for the wonderful job they did, then shared about all of the new officers in CCC. She will be

co-President with Maeve Smith, VPs: Kate Cherry and Ashley Wexler, Treasurer: Christina Burnett, Secretary: Liz Sebastiani, and ELAC: Jocie Tinoco

- C. Principal's Report: Dr. Sowers discussed the various schedules that will be put in place next year, plans for moving furniture, new staff members, professional development in August, the ice cream social in August
- D. Superintendent's Report: working on wrapping up Special Ed and Budget details
- E. Board Reports – we need a new Jaggy!

MEETING ADJOURNED AT 6:59 PM by President Skinner

Sonoma Charter School
Special Governing Board Meeting Minutes

Tuesday, September 5, 2023

6:00 p.m. Open Session

Meeting will be accessible at school – Conference Room, Sonoma Charter School

17202 Sonoma Highway, Sonoma, CA 95476

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MINUTES

6:00 p.m. CALLED PUBLIC MEETING TO ORDER, ESTABLISH QUORUM

Present: Board President Skinner, Trustees Cannard, Elin, Holladay

- I **PUBLIC COMMENT - Opportunity for public to comment on Closed Session items(s).**
No public comments were made.
- II **CLOSED SESSION - Recess to Closed Session – Board to consider and/or take action on any of the following:**
PUBLIC EMPLOYEE PERFORMANCE EVALUATION Gov. code §54957
Title: Principal/Director/Int. Superintendent
- III **RECONVENED IN OPEN SESSION - Estimated Time 7:00pm.**
Report action taken, if any, in Closed Session
No action was taken.

MOTION TO ADJOURN at 7:30 pm by President Skinner

PROPOSED BOARD MEETING CALENDAR 2023-24

The regular meetings of the SCS Board are held on the 2nd Wednesday of the month, with two meetings in June for budget adoption, and one exception in August 2024. The upcoming Board Meeting dates are:

September 13, 2023

October 11, 2023

November 8, 2023

December 13, 2023

January 10, 2024

February 14, 2024

March 13, 2024

April 10, 2024

May 8, 2024

June 12, 2024

June 26, 2024

July – no meeting

August 21, 2024 as August 14th falls in the first week of school.

As always, you are welcome to attend our meetings in Room 7 or by Zoom at 6pm on those dates. Agendas and backup materials are sent out prior to the meeting on Parent Square and posted in the School Office window.

**RESOLUTION NO. 1 – 2023-24
OF
THE SONOMA CHARTER SCHOOL**

PROCLAIMING SONOMA CHARTER SCHOOL'S CODE OF ETHICS

WHEREAS, as members of the Sonoma Charter School Board, we shall promote the best interests of the School as a whole and shall adhere to the following ethical standards:

WHEREAS, the Sonoma Charter School Board values equity in attitude, we will be fair, just, and impartial in all our decisions and actions; we will accord others the respect we wish for ourselves; we will encourage expressions of different opinions and listen with an open mind to others' ideas, and,

WHEREAS, the Sonoma Charter School Board values trustworthiness in stewardship, we will be accountable to the public by representing School policies, programs, priorities, and progress accurately, we will be responsive to the community by seeking its involvement in School affairs and by communicating its priorities and concerns, we will work to ensure prudent and accountable use of School resources, we will make no personal promise or take private action that may compromise our performance or my responsibilities, and,

WHEREAS, the Sonoma Charter School Board values honor in conduct, we will tell the truth, we will share our views while working for consensus, we will respect the majority decision as the decision of the Board, we will base our decisions on fact rather than supposition, opinion, or public favor, and,

WHEREAS, the Sonoma Charter School Board values integrity of character, we will refuse to surrender judgment to any individual or group at the expense of the School as a whole, we will consistently uphold all applicable laws, rules, policies, and governance procedures, we will not disclose information that is confidential by law or that will needlessly harm the School if disclosed, and,

WHEREAS, the Sonoma Charter School Board values commitment to service, we will focus our attention on fulfilling the Board's responsibilities of goal setting, policymaking, and evaluation, we will diligently prepare for and attend Board meetings, we will avoid personal involvement in activities the Board has delegated to the Director, we will seek continuing education that will enhance our ability to fulfill our duties effectively, and,

WHEREAS, the Sonoma Charter School Board values student-centered focus, we will be continuously guided by what is best for all students of the School.

NOW, THEREFORE BE IT RESOLVED, that the Sonoma Charter School Board adopts this Resolution.

APPROVED, PASSED, AND ADOPTED at a regular meeting of the governing body of the Sonoma Charter School on this 13th day of September 2023, by the following vote:

AYES:

NOES:

ABSTAIN:

ABSENT:

President Belli Skinner

Sonoma Charter School

Governance Handbook

The Board of Education is entrusted by the community to uphold the Constitutions of California and the United States, to protect the public interest in schools, and to ensure that a high-quality education is provided to each student.

Board Members

Belli Skinner, Chair, Parent Representative

Cole Aviles – Staff Representative

Ross Cannard – Parent Representative

Ashley Holladay – Parent Representative

Becky Perkins – Staff Representative

Marc Elin – Community Representative

Vacancy – Community Representative

Principal

Dr. Hilary Sowers

Interim Superintendent

Catherine Stone

Unity of Purpose, Roles and Responsibilities, Norms, and Agreements

This handbook reflects the governance team's work on creation of a framework for effective governance. This involves ongoing discussions about unity of purpose, roles, norms, and coming to agreement on protocols for formal structures that enable the governance team to continue to perform its responsibilities in a way that best benefits all children.

SONOMA CHARTER SCHOOL

After reviewing surveys and submissions from staff and parents we identified common themes and words. Each word reflects other core values and strengths and guides our path forward.

VISION

A small nurturing community of curious and self-aware learners who will thrive with compassion.

MISSION

Our mission is to implement and sustain each part of the Vision statement:

- *Small, nurturing community*: class size, aides, K-8, inward facing campus, morning ceremony, personalized, family like setting
- *Curious Learners*: Strong Arts Program, project-based learning, love of learning, creative thinkers
- *Self-Aware Learners*: Strong academics, enrichment programs
- *Thrive*: Happiness and success in life
- *Compassion*: Global Citizen, contribution to society, social conscience, and making the world a better place

CORE VALUES

Focus on Students

We value the unique potential of **every** child and will work to ensure they are prepared for a fulfilling life after high school

Integrity

We value truth and honesty in **every** personal interaction throughout the School.

Engagement

We value learning and teaching that engages and enriches **all** students.

We value the highest quality staff that can instill that engagement and love of learning in **all** students.

Partnership

We value strong parent, school, and greater Sonoma community partnerships including respectful and timely two-way communication between home and school.

Respect

We value providing a safe and supportive environment for **all** students.

Building a Governance Team

Unity of Purpose

School governance is the act of transforming the needs, wishes, and desires of the community into policies that direct the community's schools.

In a charter school, the Board, Principal, and Interim Administrators work together as a governance team. For a governance team to work together effectively, members need to: maintain a unity of purpose; agree on and govern within appropriate roles; create and sustain a positive governance culture; and create a supportive structure for effective governance.

What we, as a governance team, want to accomplish

Our shared purpose is to have the best learning environment for all students, including programs, facilities, and continuous improvement in all areas.

We want to build trust and move the School forward in a transparent manner.

We want to be an effective team.

We want to understand our individual jobs and collective responsibilities.

We want to be a team with a common focused direction.

We want to be partners with the staff in positive change.

We want to perpetuate a legacy of positive culture.

Roles and Responsibilities

Mutual agreement on the roles of the Board and the Administrators

The role of a Board Member is to stay focused on the big picture:

- We set the strategic direction and ensure the fulfillment of our Mission.
- We work to build the school community.
- We establish the structure.

- We hire and support a strong school leader.
- We evaluate and hold school leader(s) accountable.
- We act as community leaders and work to build the school community
- We hire and support strong school leaders
- We evaluate and hold school leaders accountable.

We carry out these responsibilities in each of the following job areas:

- ✓ Community Relations and Advocacy
- ✓ Student Learning and Achievement
- ✓ Setting School Direction
- ✓ Supporting School Goals (LCAP)
- ✓ Finance
- ✓ Facilities
- ✓ Policy

The Administrators assist the Board in carrying out its responsibilities in each of the job areas, and leads the staff toward accomplishment of the agreed upon School vision and goals.

Governance Team Culture

Culture is the positive or negative atmosphere created by the way people in an organization treat each other. Teams have unwritten (implicit) or written (explicit) agreements about how they will behave with each other and others. These behavioral ground rules, often called norms, enable teams to build and maintain a positive culture or shift a negative one.

Governance Norms

WE AGREE TO –

- **Focus on all our students’ best interests as the touchstone for our decisions.**
- **Keep from taking disagreements personally (individuality is embraced, respected).**
- **To show respect (never dismiss/devalue others).**
- **Make a commitment to effective deliberation, each listening openly while everyone is allowed to express his or her point of view.**
- **Make a commitment to transparency through open communication, honesty, and no surprise.**
- **Commit the time necessary to govern effectively. This means being there, being knowledgeable, participating, understanding the full scope of being a Board Member and being willing to take on all the responsibilities involved.**
- **Be collaborative (this is the way we operate).**
- **Maintain confidentiality.**
- **Look upon history as lessons learned; focus on the present and the future.**

Board Governance Protocols

Leadership Responsibility and Roles of the Board

The only authority to direct action rests with the majority of the Board during a Board meeting.

Individuals can request action by bringing up a new idea, explaining their interest in a particular course of action and working to get a Board majority to support moving in that direction. When a majority of the Board, sitting in a formal meeting, requests action, *that request should be made in the context of the intended results, not the methods used to achieve those results.*

Board Policies relate to the role and responsibility of the Board collectively and Board members individually.

“No individual member of the Board, by virtue of holding office, shall exercise any administrative responsibility with respect to the schools; nor as an individual, command the services of any employee” (CSBA). Board members are to channel their requests and/or concerns directly to the Administrators (or if necessary, through the Board President).

In responding to concerns, board members will:

- ***Share*** with the individual that a board member has no authority as an individual and share the appropriate line of command to follow in addressing their concern (teacher/employee, principal, interim superintendent).
- ***Receive*** the information and listen carefully, remembering that only one side of the story is being presented and thank them for sharing their thoughts;
- ***Inform*** the Administrators as soon as possible.

The Board’s Role and Relationship with Staff and Community

- Board member visits to the school are encouraged. Board members will be mindful of encroaching on the learning environment. When individually visiting the schools, as a professional courtesy, Board members are

encouraged to notify the Administrators of any issues or concerns that may arise from such a visit.

- It is imperative that a staff member is not placed in a position by a Board member to provide any information beyond the information that the Board member would be provided by any regular community member; or complete any duty as requested. Other staff members are directed to relay requests from Board members to the Administrators to ensure that appropriate information is provided to all Board members. This protocol does not imply, to either staff or to individual Board members, a censoring of private and informal conversations.

Board Meetings and the Agenda

- Meetings of the Board are held in public, but are not open-forum town hall meetings. Meetings will be conducted in such a way as to allow the public to provide input in the time allotted to ensure that multiple voices of the community inform Board deliberations; however, when the Board deliberates, it will be a time for Board members to listen and learn from each other, taking public input into consideration without re-engaging the public.
- Board meetings are normally held on the **second Wednesday of the month**. Some meetings will begin with Closed Session, beginning at 5:00pm. The Regular Public Meeting will begin at 6:00pm. Study Sessions and Special Board meetings shall be scheduled at the discretion of the Board.
- The Administrators, with the support of staff, will create each Board agenda. Board members may request items to be placed on the agenda. The Board President and Administrators will share the contents of the agenda and the process that will be followed at the meeting, in advance of the Board Meeting.
- When an individual Board member requests information, that information will be provided to all Board members. An individual Board member will, insofar as possible, work to let the Administrators and staff know ahead of time when a request for information will be made public so the staff can be prepared to provide an answer. Individual Board members will self-monitor to ensure one person's request for information does not divert an

inappropriate amount of time from staff efforts to achieve School goals as expressed in the Local Control and Accountability Plan.

- Individual Board members are expected to self-monitor compliance to the Brown Act, including limiting Closed Session to the agenda item(s). Board members need equal access to information, and to operate within the Brown Act. All communication, including electronic or social media communication is subject to the Brown Act. Any communication received by a majority of the Board shall be deemed a public record and provided to the Administrators to include in the Correspondence portion of the agenda. The Administrators shall forward questions and answers to all Board members. Board members when responding shall not “reply to all.”
- Board members will read the information provided to them, and read the Board Meeting packet before the meeting.
- Each Board member has the obligation, in serving the community, to vote on each item presented to the Board. Abstention from voting must only take place when required by law, due to a potential conflict of interest.
- The governance team will strive for brevity in deliberations, keeping remarks brief and to the point so that all opinions can be expressed and meetings can be efficient. Addressing each agenda item the Board shall normally adhere to the following process: staff presentation, Board discussion, questions for staff, input from community, and deliberation.
- Each Board member respects the right of other Board members to vote in the minority opinion. If so doing, each Board member may, as a courtesy to the team, explain the reason for their minority vote, either during deliberation or before casting the vote.

The Board’s Relationship with the Administrators

The Board will commit to work through and with the Administrators on issues regarding the running of the School. The Board and Administrators are expected to protect confidential information.

- The Administrators will inform the Board as soon as possible of serious disciplinary action, serious safety concerns, serious/unexpected personnel changes, legal or liability concerns, notable achievements
- Board members will inform the Administrators whenever they are made aware of any important situations.
- Board members will contact the Administrators with any questions, requests for information, or concerns. The Administrators will then be aware of all requests and ensures that the entire Board receives the same information.
- It is the Administrators's responsibility to organize the staff in the manner that best serves the needs of the School. The Administrators shall provide appropriate notice to the Board in advance of action being taken.
- The Board designates the Administrators as the official spokespersons for the School. The Board President is authorized to speak on behalf of the Board, when necessary.
- The Administrators will inform the Board when the media contacts the Administrators.
- The Board commits to complete an annual evaluation of the Administrators. In consultation with the Administrators, the evaluation process and associated documents will be developed. The evaluation process and instrument are designed to bring about the collective view of the Board. Thus the evaluation will reflect the majority view of the Board, as a whole.

Board Self-Evaluation

The Board commits to annually conduct a Board Self-Evaluation in order to continuously improve Board operations and to increase transparency of our processes.

The Ongoing Implementation of Board Approved Protocols

- Within 90 days of the election/appointment of a new member, a study session of the whole Board will be held for the purpose of reviewing/updating these governance protocols of the Board.
- Upon request of the Board, a special study session will be called at anytime for the purpose of reviewing/updating these governance protocols of the Board. It is particularly valuable to call a special study session whenever there are new Administrators.

This Governance Handbook was developed in a Board workshop conducted on August 4, 2022

SUMMARY OF THE BROWN ACT*

FIRM OVERVIEW

Practice Areas

Administrative Hearings
Charter School
Community College
Facilities & Business
Governance
Investigations
Labor & Employment
Litigation
Municipal
Public Finance
Public Safety
Special Education
Student
Technology & Innovation
Title IX

Statewide

Sacramento
Walnut Creek
Fresno
Monterey
Bakersfield
San Luis Obispo
Los Angeles
San Diego

The Brown Act is the most important open-meetings law for local governments in California. Compliance with the Brown Act is a critical role for the governing body. *Note: This is only a summary of key provisions of the Act, rather than a detailed overview of all its requirements.

APPLICATION

The Brown Act applies to all "legislative bodies."

"Legislative body" means:

- > **Governing Bodies:** The governing body of a local agency or any other local body created by state or federal statute.
- > **Subcommittees and Commissions:** All subcommittees and commissions created by formal action of the legislative body, whether temporary, decision making, or advisory. There is one exception for ad hoc advisory committees consisting solely of less than a quorum of the legislative body.

MEETINGS

Definition

A meeting is any congregation of a majority of the legislative body that meets at the same time and place to hear, discuss, or deliberate upon any item within the body's subject matter jurisdiction. A "meeting" includes any use of direct communication, intermediaries, or technological devices such as e-mail.

Types of Meetings

A regular meeting is the fixed formal meeting of the legislative body. Agendas must be posted at least 72 hours in advance of the meeting.

A special meeting may be called at any time either by the presiding officer or a majority of the legislative body by delivering a written notice to each member and to each local newspaper of general circulation and radio or television station requesting such notice. The notice must be delivered and the agenda posted at least 24 hours before the meeting.

AGENDAS

Agendas must contain a brief general description of each item of business to be transacted or discussed at the meeting. All agendas must be posted in a location at the agency offices that is freely accessible to the public, and also on the agency's website.

School districts must allow members of the public to place matters directly related to school district business on the agenda. The school district can reasonably control when and how the item is placed on the agenda.

Action

A legislative body may not take action on an item not appearing on the agenda, except:

- > To respond to statements made or questions posed by the public during the public comment section;
- > To ask questions of staff or the public for clarification;



- > To ask staff to report back on an item not appearing on the agenda at a subsequent meeting; or
- > To make a brief announcement.

Public Comment

Each *regular meeting* agenda must provide an opportunity for public comment on any agenda item and on any item of interest to the public within the subject matter jurisdiction of the legislative body. For *special meetings*, the agenda must provide an opportunity for members of the public directly to address the legislative body concerning any item on the agenda; comments on items not on the agenda need not be allowed.

Inspection

Writings distributed to all or to a majority of the legislative body by any person for consideration at a public meeting are public records. Documents distributed to all or a majority of the legislative body less than 72 hours before a regular meeting must be made publicly available without delay. Writings given to the legislative body at the meeting by staff must be available at the meeting, and writings distributed at the meeting by others must be available after the meeting. The terms "writing" and "document" include electronic records such as e-mail.

In addition, every agenda must state the location of an office at the agency where members of the public may inspect these documents. The agency may also post the documents on the agency's Internet Web site in a position and manner that makes it clear that the documents relate to an agenda item for an upcoming meeting.

CLOSED SESSIONS

Closed sessions are meetings conducted in private without the attendance of the public. They are permitted for specific purposes; courts construe the statutory basis for closed sessions narrowly. Generally, to preserve the confidentiality of closed sessions, only essential staff should attend a closed session.

Primary Types of Closed Sessions

- > To instruct negotiators on real property transactions
- > To instruct labor negotiators
- > To discuss "pending litigation" with agency attorneys
- > To consider the appointment, employment, evaluation, discipline, or dismissal of a public employee
- > Employee Complaints or Charges

Before holding a closed session to hear complaints or charges brought against an employee, the employee must be delivered written notice of his or her right to have the complaints or charges heard in open session at least 24 hours before the meeting.

- > Meetings regarding threats to security of public buildings or essential public services
- > Meetings among Joint Powers Agencies formed for insurance pooling and local agency Self-Insurance Authorities to consider liability issues
- > Student matters such as discipline or records challenges

Announcements from Closed Session

- > After each closed session, the legislative body must report in open session certain actions taken in closed session, and the vote of each member, including:
 - > Approval of an agreement concluding real estate negotiations
 - > Approval for legal counsel to defend, initiate, or settle litigation
 - > Disposition of claims
 - > Action to appoint, employ, dismiss, release, accept resignation of, or affect the status of any employee
 - > Approval of labor negotiation agreements

Reporting out may be deferred under certain circumstances, usually because it is contingent upon approval by another party.

Closed Session Confidentiality

No person may disclose confidential information that has been acquired by being present in an authorized closed session to unauthorized persons, unless the legislative body formally authorizes disclosure of confidential information. "Confidential information" means a communication made in a closed session that is specifically related to the basis for the closed session.


Penalties and Enforcement

A member who attends a meeting where action is taken in violation of the Brown Act, and where the member intends to deprive the public of information which the member knows or has reason to know the public is entitled, is *guilty of a misdemeanor*.

For legal advice on a particular Brown Act issue, or for any questions, please contact us at clientservices@lozanosmith.com or 559.431.5600.

ADMINISTRATIVE RESPONSIBILITIES 2023-2024

	Hilary	Catherine	Casey	Kari
Director (Superintendent)	LCAP, SARC, Board packets/meetings, Board policies, (Charter renewal), (SVUSD liaison), BGC/ELOP, Recruitment of new families	Charter-renewal; (Board packets/ meetings, Board policies, SVUSD liaison - MOUs, (BGC/ELOP)		Recruitment efforts (Sarah Tracy)
Human Resources	Job descriptions, contracts, hiring, releasing, interviewing, mandated trainings, leaves, (salary schedule), (substitutes), monitor credentialing progress, retirements, resignations, staff handbook, complaints, (annual notifications), Child abuse reporting, sexual harassment, discipline of staff	(Contracts), (leaves), salary schedule, (monitor credentialing progress), (staff handbook), (complaints), annual notifications, Child abuse reporting	New teacher support, interviewing teacher candidates, (monitor credentialing progress), Child abuse reporting	(Job descriptions, contracts), posting, benefits, onboarding, (mandated trainings), substitutes, retirements, resignations, workplace injuries, Child abuse reporting
Communications	Parent Square, newsletters, bulletins, publicity, newspapers - (Sarah T), surveys, Parent meetings, parents on campus, CCC meetings, upset	(Upset parents), (fundraising),	(Upset parents)	(Upset parents) (School website (Aron))

	parent(s), fundraising, Attendance meetings, and communications, community liaison, Sign in front of school				
Operations	Oversight 				(Maintenance, facilities, grounds, custodial (Paul and Glenn), fire extinguishers, fire alarm system, supplies, Nutrition - SVUSD), copiers, appliances
Fiscal			Insurance (RESIG), (Accounts payable/receivable - Laurelle), budget, operational costs, audit,		Payroll, time sheets, attendance reporting, Free and Reduced lunch,
Technology	Technology Use Agreement (see board policy for agreement approved by board)				Erica (and Dee):1:1 devices, Educational software maintenance, hardware maintenance, TVs and other tech devices, Phone system (and Kari and Dee)
Teaching and Learning	Staff development, curriculum (evaluate), (instruction), staff evaluations, academic calendar, assessment calendar, report cards, grading, student support, equity, monitor	Curriculum (order)			(Staff development), curriculum (evaluate, order, maintain), instruction, mentors, state testing (CAASPP, ELPAC), coaching, grading, intervention, GLPP, English Learners

	<p>field trips, PLC (student data, student goals, best practices), instructional minutes, engagement, innovation and charter goals, MTSS and PBIS, ELAC meetings, state surveys, middle school program, gifted education, 504 plans, SIPs and SSTs, classroom observations, morning meetings, Second Step/Character Strong, Parent/Student Handbook, suicide prevention, independent studies, drug and alcohol prevention</p>		<p>(integrated instruction, reclassification, tracking), GLPP aide training</p>	<p>Independent studies (Kari)</p>
<p>Special Education</p>	<p>Special Ed Team meetings, IEP meetings, service providers/staffing (1:1 IAs, (scheduling,) supplies, legal issues, SEIS, CPI training (ED selpa does this), nurse screenings</p>	<p>(Special Ed Team meetings, legal issues, SEIS)</p>		<p>Scheduling - Angela</p>
<p>Supervision</p>	<p>Handbook? Procedures?</p>		<p>Supervision schedule (before school, breakfast, crossing, recesses, lunch,</p>	

					dismissal), rainy days/heat days, supplies	
Emergency Preparedness	Emergency drills, drill schedule, maps, 1st aid/CPR training			Emergency plan	Bus evac Emergency supplies	
Discipline	Restorative conversations, parent contact, meetings, communication with staff, documentation, re-entry after suspension, SARB meetings	(Parent contact)		(Parent contact)	(Parent contact)	
Special Events	Morning ceremony (prep, set-up), assemblies, fire department presentation, student recognition. Bike event (?), graduation, 30 year anniversary, Back-to-School Night, Open House, Recruitment evening,			"Families"	Picture Day CCC events - CCC 30 year anniversary Spirit Days - Julie/Ldrshp	
Mental Health	Receive requests for behavior intervention, counselor, risk assessment, mentor program					
Staff	Staff meetings, covering			Cluster meetings, (staff	Staff Appreciation Week	

	for staff who are absent, Cheers for Peers, administrative professionals day, conflict resolution			(CCC) Covering for staff who are absent (Rover)
Director (Principal)	LCAP, School Site Council, weekly communications with staff, professional goals, visiting classrooms, lottery, enrollment, monitor staff work days, review student data (attendance, behavior, academic), review cum folders, meet with office and custodial staff, meet with Academic Specialist, coordinate services for students in need, organize/maintain spaces on campus, facilities/program development (such as student garden), maintain sense of humor	(LCAP), (Enrollment)	Review student data (academic)	Enrollment tracking Attendance data
Health	Health/COVID policy, guidelines			Health Tech Maintain supplies Comprehensive Health Education (M Screenings (Karen -

Charter School Renewal Terms

California *Education Code (EC)* Section 47607.4, which was amended by Senate Bill 114 [Chapter 48, Statutes of 2023], states the following [bold emphasis added]:

Notwithstanding the renewal process and criteria established in Sections 47605.9, 47607, and 47607.2 or any other law, effective July 1, 2021, all charter schools whose term expires on or between January 1, 2022, and June 30, 2025, inclusive, shall have

<https://www.cde.ca.gov/sp/ch/renewalprocess.asp#terms>

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9/6/23, 1:30 PM

Charter School Renewals - Charter Schools (CA Dept of Education)

their term extended by two years, and **all charter schools whose term expires on or between January 1, 2024, and June 30, 2027, inclusive, shall have their term extended by one additional year.**

The below table summarizes charter schools' extended terms, pursuant to this Section:

Previous Charter Term Expiration Date	New Charter Term Expiration Date
June 30, 2024	June 30, 2025
June 30, 2025	June 30, 2026
June 30, 2026	June 30, 2027
June 30, 2027	June 30, 2028

The Charter Schools Division has automatically updated the charter term for charter schools impacted by this extension. To view the expiration date of a charter school, visit the [Charter School Database](#).

No action is required of charter authorizers or charter schools for this extension. *EC* Section 47607.4 does not preclude charter authorizers from invoking revocation procedures, pursuant to *EC* Section 47607.

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LOCAL ASSIGNMENT OPTIONSRESOLUTION REGARDING MULTIPLE SUBJECT INSTRUCTION

WHEREAS, Education Code section 47605(l) provides charter schools with the ability to utilize local assignment options authorized in statute and regulations for the purpose of legally assigning certificated teachers;

WHEREAS, Education Code section 44256 allows charter schools to utilize the practice of assignment of teachers and students for multiple subject matter instruction, as is commonly practiced in California elementary schools

WHEREAS, the Governing Board of the Sonoma Charter School wishes to utilize multiple subject matter instruction assignment practices in accordance with the Education Code;

NOWHEREFORE IT IS RESOLVED:

The Governing Board of the Sonoma Charter School hereby authorizes the holder of a multiple subject teaching credential or a standard elementary credential to teach any subject in departmentalized classes to a given class or group of pupils below grade 9, provided that the teacher has completed at least 12 semester units, or six upper division or graduate units, or coursework at a regionally accredited institution of higher education in each subject to be taught. The authorization shall be with the teacher's consent.

RESOLUTION REGARDING SINGLE SUBJECT OR STANDARD SECONDARY
TEACHING CREDENTIAL IN MIDDLE SCHOOL

WHEREAS, Education Code section 47605(l) provides charter schools with the ability to utilize local assignment options authorized in statute and regulations for the purpose of legally assigning certificated teachers;

WHEREAS, Education Code section 44258.2 allows the Governing Board of Sonoma Charter School to assign the holder of a single subject teaching credential or a standard secondary teaching credential to teach classes in grades 5 to 8, inclusive, in a middle school; if the credential holder has a minimum of 12 semester units, or six upper division or graduate units, of coursework at a regionally accredited institution of higher education in the subject to which the credential holder is assigned;

WHEREAS, [Employee name] is employed by [School Name], holds a single subject teaching credential or standard secondary teaching credential, has provided the Governing Board of [School Name] with [his/her/their] consent to teach in grades 5 to 8, inclusive, and has a minimum of 12 semester units, or six upper division or graduate units, of coursework at a

regionally accredited institution of higher education in the subject to which [employee name] is assigned;

NOW THEREFORE IT IS RESOLVED:

The Governing Board of Sonoma Charter School hereby assigns [employee name] to teach classes in grades 5 to 8, inclusive under the provisions of Education Code 44258.2.

The Education Code permits the governing board of a charter school to assign the holder of a credential, other than an emergency permit, to teach any subjects in departmentalized classes in kindergarten or any of grades 1 to 12, inclusive, if the governing board verifies, before making the assignment, that the teacher has adequate knowledge of each subject to be taught and the teacher consents to that assignment. The board is required to adopt policies and procedures for the purpose of verifying the adequacy of subject knowledge on the part of each of those teachers. This policy is intended to satisfy the requirements of the statute. (EC 44258.3)
This policy is required to be developed with subject matter specialists in the subjects commonly taught in the charter school, as well as the implementation of the policy.
A departmentalized classroom setting is one in which an instructor teaches a specific subject matter area to a group of students. The instructor may teach specific content to several different groups of students during multiple classes throughout the day. This is the classroom organization usually found in middle, junior, or high school settings, but may also be found at the elementary level in classes such as art, physical education, science, mathematics, and music.

The Education Code allows for the Governing Board of Sonoma Charter School to assign the holder of a credential, other than an emergency permit, to teach any subjects in departmentalized classes in kindergarten or any of grades 1 to 12, inclusive, so long as the Governing Board verifies, before making the assignment, that the teacher has adequate knowledge of each subject to be taught and the teacher consents to that assignment. (EC 44258.3)

The Governing Board of Sonoma Charter School has consulted with subject matter specialists in the subjects commonly taught in Sonoma Charter School in developing this policy. The Governing Board of Sonoma Charter School will involve subject matter specialists in implementing this policy. Subject matter specialists are mentor teachers, curriculum specialists, resource teachers, classroom teachers certified to teach a subject, staff to regional subject matter projects or curriculum institutes, or college faculty.

In order to assess subject matter competence for holders of a credential in departmentalized classes in kindergarten or any of grades 1 to 12, inclusive, the Executive Director, or his/her/their designee shall do one or more of the following:

- 1) Conduct an oral interview with the credential holder

- 2) Review the credential holder's transcripts and other evidence of preparation for the subject area.
- 3) Demonstrate knowledge of the subject matter to be taught, including knowledge of the curriculum framework for the subject to be taught and the specific content of the course of study in the school for the subject, at the grade level(s) to be taught.

Adopted: 09/13/23

Amended:

Assignment to Elective Courses

The Governing Board of Sonoma Charter School hereby creates an Assignment Committee to approve assignments for teachers to teach an elective course in a teacher's area of special skills or preparation outside of the teacher's credential. The Assignment Committee shall be made up of 1 teacher and 1 administrator. The teacher on the Assignment Committee shall be selected by middle school teachers at Sonoma Charter School. The administrator shall be the administrator at Sonoma Charter School.

Upon the Assignment Committee's recommendation, and with the teacher's consent, a teacher employed on a full-time basis who teaches kindergarten or any grades 1 to 12, inclusive, and who has special skills and preparation outside of the teacher's credential authorization, may be assigned by the Executive Director to teach an elective course in the area of the special skills or preparation. Such assignments shall be valid for a maximum of one school year but may be extended by action of the committee upon application by the Executive Director and the teacher.

In order to use this assignment flexibility, Sonoma Charter School shall submit a plan to the county superintendent of schools that will include, but need not be limited to, the following: 1) Statements signed by the Executive Director and the chairperson of the Governing Board of Sonoma Charter School approving the establishment of the Assignment Committee; 2) Procedures for selection of the committee membership; 3) Terms of office for committee members; and 4) Criteria for determining teachers' qualifications for these assignments.

The Education Code allows a licensed teacher to teach a single subject class in which he/she/they have 18 semester hours of coursework or nine semester hours of upper division or graduate coursework or a multiple subject class if he/she/they hold at least 60 semester hours equally distributed among the ten areas of diversified major set forth in Education Code section 44314. A three-semester-unit variance in any of the required 10 areas may be allowed. EC 44263. The governing board is required to provide specific authorization for the assignment by resolution.

RESOLUTION REGARDING ASSIGNMENT TO SINGLE SUBJECT OR MULTIPLE
SUBJECT CLASS

WHEREAS, Education Code section 47605(1) provides charter schools with the ability to utilize local assignment options authorized in statute and regulations for the purpose of legally assigning certificated teachers;

WHEREAS, Education Code section 44263 allows a licensed teacher to teach a single subject class in which he/she/they have 18 semester hours of coursework or nine semester hours of upper division or graduate coursework or a multiple subject class if he/she/they hold at least 60 semester hours equally distributed among the ten areas of diversified major set forth in Education Code section 44314. A three-semester-unit variance in any of the required 10 areas may be allowed;

WHEREAS, **[Use this WHEREAS if the teacher is going to teach a single subject class]**[Employee name] is employed by [School Name] as a licensed teacher, and has a minimum of 18 semester hours of coursework or nine semester hours of upper division or graduate coursework;

WHEREAS, **[Use this WHEREAS if the teacher is going to teach a multiple subject class]**[Employee name] is employed by [School Name] as a licensed teacher, and has a minimum of 60 semester hours equally distributed among the ten areas of diversified major set forth in Education Code section 44314;

NOW THEREFORE IT IS RESOLVED:

The Governing Board of [School Name] hereby assigns [employee name] to teach a [single or multiple] subject class [identified here] under the provisions of Education Code 44263.

Adopted: 09/13/23

Amended:

COMMUNITY USE OF FACILITIESFee Schedule

Charges for use of meeting rooms at a time when the Charter School personnel are not present shall be as follows:

1. Use of facilities at Sonoma Charter School shall be assessed in half-hour increments at a rate of \$20.00 per one-half hour for use of the Playbox and Multipurpose Room, and \$10.00 per half hour for use of a classroom or playfield. An additional \$25.00 fee will be charged for securing the site (locking and unlocking rooms and restrooms and turning off/on the security system).
2. Free use: When an alternative location is not available, the Board shall not charge any fees for the use of school facilities or grounds by clubs, associations or non-profit organizations which promote youth, their families, and school activities. These groups include, but are not limited to: Girl/Boy Scouts, PTO/CCC, youth sports.
3. Failure to provide five (5) days notice of cancellation of meetings will result in a charge of \$15.00.
4. All damage and/or abuse of meeting rooms will be charged for according to the direct time and materials involved to return the meeting room to its original condition. Damage and cost involved will be determined by the Executive Director and the user billed.

Priority of Uses

Because the Charter School has a limited number of rooms, demand for use that exceeds the number of rooms available shall be satisfied according to the priority ranking (highest to lowest). If a request for a higher priority use is received for a given facility ten or more work days prior to the date on which a tentative use has been granted, the tentative assignment shall be canceled and the facility assigned a higher use.

1. Activities required by, or in furtherance of, the responsibilities of the Charter School.
2. The State Superintendent of Public Instruction, the State Board of Education, or federal educational agencies.
3. Elementary, secondary, unified, and community college districts in the Charter School's county.
4. Private nonprofit organizations serving handicapped children in the Charter School's county.
5. Other school-related private nonprofit organizations.
6. Public universities in the Charter School's county.

7. Other local government.
8. Agencies other than state and federal agencies.
9. Other private, nonprofit organizations.
10. Other private groups or individuals.

Prohibited Uses

The following public uses are prohibited:

1. The operation of any powered machinery of any type except for office and audiovisual equipment.
2. The use of open flame except as part of an established ritual under adult supervision.
3. Any use by employees of the Charter School for profit or other personal benefit.
4. The sale, delivery, or consumption of alcoholic beverages.
5. Any use in such a fashion as to institute a monopoly on such use by any organization or individual.
6. Any use for which an admission fee is charged, except where such fee is charged by a nonprofit organization or governmental agency.
7. Any use which interferes with or is likely to interfere with the instruction of students or other operations of the Charter School.
8. No alcoholic beverages or controlled substances are to be consumed, sold, given away or delivered to any person on the property of the Charter School. Any person deemed to be under the influence of alcoholic beverages or controlled substances will be denied participation in the activity being conducted on the Charter School property and may be barred from having or receiving any future privilege of use of the Charter School facility.
9. Smoking is not allowed inside any of the buildings. The Charter School facility is a designated "No Smoking" facility.
10. Any City or County ordinances governing such activities will be applicable to activities under these rules and regulations.
11. Profane language, gambling, or fighting, will be considered misconduct and will be cause for cancellation of permission for use.
12. Any activity prohibited by federal or state law shall not be permitted on Charter school premises at any time. Any such activity will be considered misconduct and will be cause for cancellation of permission for use. The Charter School will notify the appropriate law enforcement authority in the event such misconduct occurs.

Available Facilities

The following facility or portion of facility will be made available for public use: Classrooms,

Playbox, multipurpose room, playfield

Adopted: 03/13/2023

Amended:

2022-23 Unaudited Actuals Report

CHARTER SCHOOL UNAUDITED ACTUALS
 FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2022 to June 30, 2023

Charter School Name: Sonoma Charter
 CDS #: 49-70953-6111678
 Charter Approving Entity: Sonoma Valley Unified
 County: Sonoma
 Charter #: 0009

This charter school uses the following basis of accounting:

(Please enter an "X" in the applicable box below; check only one box)

- Accrual Basis (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 6910, 7438, 9400-9489, 9660-9669, 9796, and 9797)**
 Modified Accrual Basis (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 6600, 7438, 7439, and 9711-9789)

Description	Object Code	Unrestricted	Restricted	Total
A. REVENUES				
1. LCFF Sources				
State Aid - Current Year	8011	169,630.00		169,630.00
Education Protection Account State Aid - Current Year	8012	38,510.00		38,510.00
State Aid - Prior Years	8019	1,392.00		1,392.00
Transfers to Charter Schools in Lieu of Property Taxes	8096	1,883,936.67		1,883,936.67
Other LCFF Transfers	8091, 8097	0.00	0.00	0.00
Total, LCFF Sources		2,093,468.67	0.00	2,093,468.67
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290		46,865.00	46,865.00
Special Education - Federal	8181, 8182		29,802.00	29,802.00
Child Nutrition - Federal	8220		0.00	0.00
Donated Food Commodities	8221		0.00	0.00
Other Federal Revenues	8110, 8260-8299	0.00	0.00	0.00
Total, Federal Revenues		0.00	76,667.00	76,667.00
3. Other State Revenues				
Special Education - State	StateRev SE		149,445.00	149,445.00
All Other State Revenues	StateRev AO	47,605.15	312,398.90	360,004.05
Total, Other State Revenues		47,605.15	461,843.90	509,449.05
4. Other Local Revenues				
All Other Local Revenues	LocalRev AO	35,460.45	0.00	35,460.45
Total, Local Revenues		35,460.45	0.00	35,460.45
5. TOTAL REVENUES				
		2,178,534.27	538,510.90	2,715,045.17
B. EXPENDITURES (see NOTE in Section L)				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	696,538.39	121,806.25	818,344.64
Certificated Pupil Support Salaries	1200	0.00	29,302.77	29,302.77
Certificated Supervisors' and Administrators' Salaries	1300	151,666.58	0.00	151,666.58
Other Certificated Salaries	1900	4,354.22	36,512.50	40,866.72
Total, Certificated Salaries		852,559.19	187,621.52	1,040,180.71
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100	325,513.98	121,044.16	446,558.14
Noncertificated Support Salaries	2200	68,148.14	0.00	68,148.14
Noncertificated Supervisors' and Administrators' Salaries	2300	0.00	0.00	0.00
Clerical, Technical and Office Salaries	2400	99,177.74	0.00	99,177.74
Other Noncertificated Salaries	2900	0.00	0.00	0.00
Total, Noncertificated Salaries		492,839.86	121,044.16	613,884.02
3. Employee Benefits				
STRS	3101-3102	150,930.97	23,264.99	174,195.96
PERS	3201-3202	103,997.85	38,143.02	142,140.87
OASDI / Medicare / Alternative	3301-3302	46,923.68	13,797.16	60,720.84

Health and Welfare Benefits	3401-3402	119,124.32	7,500.00	126,624.32
Unemployment Insurance	3501-3502	8,163.46	171.19	8,334.65
Workers' Compensation Insurance	3601-3602	17,766.97	362.93	18,129.90
OPEB, Allocated	3701-3702	0.00	0.00	0.00
OPEB, Active Employees	3751-3752	0.00	0.00	0.00
Other Employee Benefits	3901-3902	0.00	0.00	0.00
Total, Employee Benefits		446,907.25	83,239.29	530,146.54
4. Books and Supplies				
Approved Textbooks and Core Curricula Materials	4100	1,151.29	10,000.00	11,151.29
Books and Other Reference Materials	4200	0.00	0.00	0.00
Materials and Supplies	4300	81,898.86	20,159.21	102,058.07
Noncapitalized Equipment	4400	57,196.55	17,303.51	74,500.06
Food	4700	0.00	0.00	0.00
Total, Books and Supplies		140,246.70	47,462.72	187,709.42
5. Services and Other Operating Expenditures				
Subagreements for Services	5100	0.00	56,526.75	56,526.75
Travel and Conferences	5200	1,503.70	10,200.00	11,703.70
Dues and Memberships	5300	693.26	0.00	693.26
Insurance	5400	27,624.00	0.00	27,624.00
Operations and Housekeeping Services	5500	43,852.72	0.00	43,852.72
Rentals, Leases, Repairs, and Noncap. Improvements	5600	25,466.03	0.00	25,466.03
Transfers of Direct Costs	5700-5799	0.00	0.00	0.00
Professional/Consulting Services and Operating Expend	5800	224,511.04	177,213.25	401,724.29
Communications	5900	9,490.00	0.00	9,490.00
Total, Services and Other Operating Expenditures		333,140.75	243,940.00	577,080.75
6. Capital Outlay				
(Objects 6100-6170, 6200-6500 modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major				
Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Lease Assets	6600			0.00
Depreciation Expense (accrual basis only)	6900	6,196.44	0.00	6,196.44
Amortization Expense - Lease Assets	6910	0.00	0.00	0.00
Total, Capital Outlay		6,196.44	0.00	6,196.44
7. Other Outgo				
Tuition to Other Schools	7110-7143	0.00	0.00	0.00
Transfers of Pass-Through Revenues to Other LEAs	7211-7213	0.00	0.00	0.00
Transfers of Apportionments to Other LEAs - Spec Ed	7221-7223SE		0.00	0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0.00	0.00	0.00
All Other Transfers	7261-7299	0.00	0.00	0.00
Transfers of Indirect Costs	7300-7399	0.00	0.00	0.00
Debt Service:				
Interest	7438	0.00	0.00	0.00
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		0.00	0.00	0.00
Total, Other Outgo		0.00	0.00	0.00
8. TOTAL EXPENDITURES		2,271,890.19	683,307.69	2,955,197.88
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A6-B8)		(95,355.92)	(144,796.79)	(240,152.71)
D. OTHER FINANCING SOURCES / USES				
1. Other Sources	8930-8979	0.00	0.00	0.00

Less					
2. Other Uses	7630-7699	0.00	0.00	0.00	
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(144,796.79)	144,796.79	0.00	
4. TOTAL OTHER FINANCING SOURCES / USES		(144,796.79)	144,796.79	0.00	
E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)		(240,152.71)	0.00	(240,152.71)	
F. FUND BALANCE / NET POSITION					
1. Beginning Fund Balance/Net Position					
a. As of July 1	9791	559,481.80	0.00	559,481.80	
b. Adjustments/Restatements	9793-9795	(15,309.80)	0.00	(15,309.80)	
c. Adjusted Beginning Fund Balance /Net Position		544,172.00	0.00	544,172.00	
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		304,019.29	0.00	304,019.29	
Components of Ending Fund Balance (Modified Accrual Basis only)					
a. Nonspendable					
1. Revolving Cash (equals Object 9130)	9711			0.00	
2. Stores (equals Object 9320)	9712			0.00	
3. Prepaid Expenditures (equals Object 9330)	9713			0.00	
4. All Others	9719			0.00	
b. Restricted	9740			0.00	
c. Committed					
1. Stabilization Arrangements	9750			0.00	
2. Other Commitments	9760			0.00	
d. Assigned	9780			0.00	
e. Unassigned/Unappropriated					
1. Reserve for Economic Uncertainties	9789			0.00	
2. Unassigned/Unappropriated Amount	9790M			0.00	
3. Components of Ending Net Position (Accrual Basis only)					
a. Net Investment in Capital Assets	9796	27,883.12	0.00	27,883.12	
b. Restricted Net Position	9797		0.00	0.00	
c. Unrestricted Net Position	9790A	276,136.17	0.00	276,136.17	
	Description	Object Code	Unrestricted	Restricted	Total
G. ASSETS					
1. Cash					
In County Treasury	9110	78,790.53	0.00	78,790.53	
Fair Value Adjustment to Cash in County Treasury	9111	0.00	0.00	0.00	
In Banks	9120	187,979.92	227,772.61	415,752.53	
In Revolving Fund	9130	0.00	0.00	0.00	
With Fiscal Agent/Trustee	9135	0.00	0.00	0.00	
Collections Awaiting Deposit	9140	0.00	0.00	0.00	
2. Investments	9150	0.00	0.00	0.00	
3. Accounts Receivable	9200	0.00	0.00	0.00	
4. Due from Grantor Governments	9290	190,586.94	59,829.55	250,416.49	
5. Stores	9320	0.00	0.00	0.00	
6. Prepaid Expenditures (Expenses)	9330	29,695.90	0.00	29,695.90	
7. Other Current Assets	9340	0.00	0.00	0.00	
8. Lease Receivable	9380	0.00	0.00	0.00	
9. Capital Assets (accrual basis only)	9400-9489	27,883.12	0.00	27,883.12	
10. TOTAL ASSETS		514,936.41	287,602.16	802,538.57	
H. DEFERRED OUTFLOWS OF RESOURCES					
1. Deferred Outflows of Resources	9490	0.00	0.00	0.00	
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00	
I. LIABILITIES					
1. Accounts Payable	9500	195,917.12	0.00	195,917.12	
2. Due to Grantor Governments	9590	0.00	0.00	0.00	
3. Current Loans	9640	0.00	0.00	0.00	
4. Unearned Revenue	9650	15,000.00	287,602.16	302,602.16	

5. Long-Term Liabilities (accrual basis only)	9660-9669	0.00	0.00	0.00
6. TOTAL LIABILITIES		210,917.12	287,602.16	498,519.28
J. DEFERRED INFLOWS OF RESOURCES				
1. Deferred Inflows of Resources	9690	0.00	0.00	0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
K. FUND BALANCE /NET POSITION				
Ending Fund Balance /Net Position, June 30 (G10 + H2) - (I6 + J2) (must agree with Line F2)		304,019.29	0.00	304,019.29

L. FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT

NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT:

1. Federal Revenue Used for Capital Outlay and Debt Service

Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

Federal Program Name (if no amounts, indicate "NONE")	Capital Outlay	Debt Service	Total
a NONE	\$ 0.00	0.00	0.00
b			0.00
c			0.00
d			0.00
e			0.00
f			0.00
g			0.00
h			0.00
i			0.00
j			0.00
TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE	0.00	0.00	0.00

2. Community Services Expenditures

Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

Objects of Expenditures	Amount (Enter "0.00" if none)
a Certificated Salaries 1000-1999	0.00
b Noncertificated Salaries 2000-2999	0.00
c Employee Benefits 3000-3999 except 3801-3802	0.00
d Books and Supplies 4000-4999	0.00
e Services and Other Operating Expenditures 5000-5999	0.00
TOTAL COMMUNITY SERVICES EXPENDITURES	0.00

3. Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster

Date of Presidential Disaster Declaration	Brief Description i.e., COVID-19 (if no amounts, indicate "None")	Amount
a	None	0.00
b		
c		
d		
TOTAL SUPPLEMENTAL EXPENDITURES (Should not be negative)		0.00

4. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:

Results of this calculation will be used for comparison with 2021-22 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis may result in reduction to allocations for covered programs in 2024-25

a. Total Expenditures (B8)	2,955,197.88
b. Less Federal Expenditures (Total A2)	
[Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred]	76,667.00
c. Subtotal of State & Local Expenditures (a minus b)	2,878,530.88
d. Less Community Services (L2 Total)	0.00
e. Less Capital Outlay & Debt Service (Total B6 plus objects 7438 and 7439, less L1 Total, less objects 6600 and 6910)	6,196.44
f. Less Supplemental Expenditures made as the result of a Presidentially	0.00

Declared Disaster

TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE

{c minus d minus e minus f}

\$ 2,872,334.44

2022-23 Education Protection Account
Final Expenses

Sonoma Charter School
 Final expenditures through: June 30, 2023
 Resource 1400 Education Protection Account

Description	Object Codes	Amount
AMOUNT AVAILABLE FOR THIS FISCAL YEAR		
Local Control Funding Formula Sources	8010-8099	39,896.00
Federal Revenue	8100-8299	0.00
Other State Revenue	8300-8599	0.00
Other Local Revenue	8600-8799	0.00
TOTAL AVAILABLE		39,896.00
EXPENDITURES AND OTHER FINANCING USES		
Certificated Salaries	1000-1999	33,094.98
Classified Salaries	2000-2999	0.00
Employee Benefits	3000-3999	6,801.02
Books and Supplies	4000-4999	0.00
Services, Other Operating Expenses	5000-5999	0.00
Capital Outlay	6000-6599	0.00
Other Outgo (excluding Direct Support/Indirect Costs)	7100-7299	
	7400-7499	0.00
Direct Support/Indirect Costs	7300-7399	0.00
TOTAL EXPENDITURES AND OTHER FINANCING USES		39,896.00
BALANCE (Total Available minus Total Expenditures and Other Financing Uses)		0.00

**2022-23 Consolidated Application
for Federal Funding**

2023–24 Application for Funding

CDE Program Contact:

Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297

Local Governing Board Approval

The local educational agency (LEA) is required to review and receive approval of their Application for Funding selections with their local governing board.

By checking this box the LEA certifies that the Local Board has approved the Application for Funding for the listed fiscal year	Yes
---	-----

District English Learner Advisory Committee Review

Per Title 5 of the California Code of Regulations Section 11308, if your LEA has more than 50 English learners, then the LEA must establish a District English Learner Advisory Committee (DELAC) which shall review and advise on the development of the application for funding programs that serve English learners.

By checking this box the LEA certifies that parent input has been received from the District English Learner Committee (if applicable) regarding the spending of Title III funds for the listed fiscal year	No
---	----

Application for Categorical Programs

To receive specific categorical funds for a school year, the LEA must apply for the funds by selecting Yes below. Only the categorical funds that the LEA is eligible to receive are displayed.

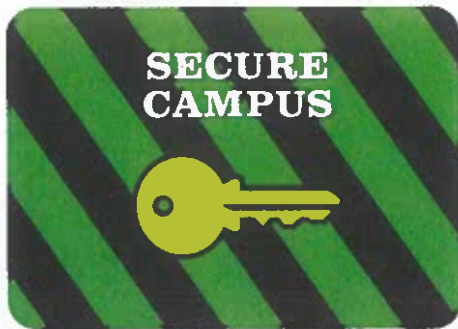
Title I, Part A (Basic Grant) ESSA Sec. 1111et seq. SACS 3010	Yes
Title II, Part A (Supporting Effective Instruction) ESEA Sec. 2104 SACS 4035	Yes
Title III English Learner ESEA Sec. 3102 SACS 4203	Yes
Title III Immigrant ESEA Sec. 3102 SACS 4201	Yes
Title IV, Part A (Student and School Support) ESSA Sec. 4101 SACS 4127	Yes

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.



SHELTER IN PLACE



SECURE CAMPUS

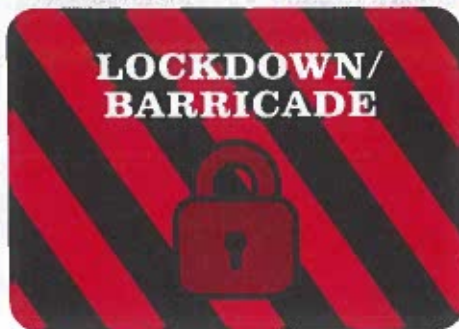


EVACUATION



DROP, COVER, AND HOLD ON

DROP! COVER! HOLD ON!



LOCKDOWN/BARRICADE

THE **Big Five**

Staff Packet - 2023-24

**Immediate Action Emergency
Response for Schools**



**Coalition for
Safe Schools &
Communities**



**SAN MATEO
COUNTY
OFFICE OF
EDUCATION**

2023-2024 OVERVIEW

San Mateo County's Big Five protocols provide a shared understanding of emergency response using common language across the county's 23 school districts and 20 municipalities and law enforcement agencies.

First released in 2014 after a year-long stakeholder engagement process involving experts from education, law enforcement, fire, public health, law, government, and the community at large, the Big Five outlines five immediate actions to implement in any emergency. The Big Five action responses are Shelter in Place; Drop, Cover, and Hold On; Secure Campus; Lockdown/Barricade; and Evacuation.

The Big Five is under constant review by the multi-disciplinary Steering Committee of the San Mateo County Coalition for Safe Schools and Communities. The Steering Committee meets regularly to build and strengthen relationships, review activities, analyze emerging challenges, and make recommendations.

In addition to the Big Five, the Coalition's robust portfolio of **safety guidance tools** (www.smcoe.org/schoolsafety) includes the following: Big Five Lesson Plans for all K-12 grade students; Student Threat Assessment; Suicide Prevention Toolkit; Child Sexual Abuse Protocol; CSEC and Human Trafficking Protocol for Educators; Naloxone for Schools Toolkit; and assistance with Comprehensive School Safety Plans.

The focus for the 2023-2024 school year is on a countywide strategic planning process for youth social, emotional, and behavioral health as well as an update of the Child Sexual Abuse Protocol with expanded trainings for school leaders. Additionally, we will be providing technical assistance to our friends in Monterey County and at the Monterey County Office of Education who in spring/summer of 2023 formally adopted the Big Five Protocols and developed their own regional safety coalition.

Our resources and collaborations continue to grow across the state and the county. The Coalition for Safe Schools and Communities is more committed than ever to our partners, school districts, and students as we continue to pursue our vision: to create and sustain safe and positive school and community environments so all youth may thrive and succeed.

Let's make it a great year!

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TRAUMA-INFORMED APPROACHES

To minimize detrimental mental health impacts on students and staff, school leaders are asked to use trauma-informed approaches when practicing and implementing the Big Five protocols. The following table provides grade-appropriate guidance for supporting students during the preparation, response, and recovery phases of emergency planning and/or incidents. Specific recommendations for planning and implementing trauma-informed safety drills can be found on page 5.

	Preparedness	Response	Recovery
All Grades	<p>Staff: Train all staff on procedures Use the word “safety” when conducting safety drills</p> <p>Students: Practice grounding and calming skills with students</p> <p>Parents/Guardians: Educate parents on protocols Inform parents of safety drills well in advance</p>	<p>Staff: Remain calm Students take their cues from adults. Model calm confidence.</p> <p>Students: Students use their calming skills during their response</p> <p>Parents/Guardians: Notify parents in home language as soon as it is safe regarding the situation or once the safety drill has concluded</p>	<p>Engage students in a movement activity</p> <p>Notice students who may be experiencing anxiety/fear. Check in personally with any students of concern and inform counselors or parents as needed.</p>
<p>Pre-K to Kinder</p> <p><i>Developmental Considerations:</i> Students require adult guidance to determine what action to take Engage in social stories with students instead of simulated safety drills No prior knowledge of the Big Five or emergency response actions</p>	<p>Students: Use Big Five posters as a visual tool Use <i>Think-on-your-Feeet</i> books to help students learn and prepare for emergency safety drills and responses</p>	<p>Staff: Act with confidence Use age-appropriate language</p> <p>Students: Allow/encourage students to hold a calming item (stuffed animal, book, small toy)</p>	<p>Praise students for what they did well during the safety drill</p> <p>Reinforce the concept that preparedness is key to overall school safety</p>

TRAUMA-INFORMED APPROACHES

	Preparedness	Response	Recovery
<p>1st Grade to 5th Grade</p> <p><i>Developmental Considerations:</i> Students can understand safety directions and instructions Students are capable of understanding purpose of safety drills Teachers/leaders engage in social stories with students instead of simulated safety drills</p>	<p>Students: Use Big Five posters as a visual tool Use <i>Think-on-Your-Feeet</i> and related curriculum to help students prepare and learn</p> <p>Parents/Guardians: Encourage families to discuss the Big Five Protocols and emergency preparedness at home using <i>Think-on-Your-Feeet</i></p>	<p>Staff: Give clear instructions and follow protocol</p> <p>Students: If needed, allow students to hold a calming item (stuffed animal, book, small toy)</p>	<p>Identify how the class worked well together Give students time to ask questions Reiterate that safety drills help us stay safe Move back into learning when class is ready</p>
<p>6th Grade to 8th Grade</p> <p><i>Developmental Considerations:</i> Students are capable of understanding purpose of safety drills Students benefit from adult direction but are able to perform Big Five actions independently Review prior knowledge of the Big Five protocols</p>	<p>Staff: Clearly post the Big Five Protocols in each classroom</p> <p>Parents/Guardians: Encourage families to discuss the Big Five Protocols and Emergency Preparedness at home</p>	<p>Staff: Give clear instructions and follow protocol Emphasize cooperation as a class</p> <p>Students: Assign students to perform action steps during the incident or safety drill</p>	<p>Acknowledge students who performed specific tasks and identify how the class worked well together Give students time to ask questions Reiterate that safety drills help us stay safe Move back into learning when class is ready</p>
<p>9th Grade to 12th Grade</p> <p><i>Developmental Considerations:</i> Students are able to identify probable dangers confronting a school Students benefit from adult direction, but are able to perform Big Five actions independently in an emergency</p>	<p>Staff: Clearly post the Big Five Protocol in classroom</p> <p>Students: Have students discuss what to expect during a safety drill or incident Assign students specific roles and have them walk through those actions</p>	<p>Staff: Give clear instructions and follow protocol</p> <p>Students: Assign students to perform specific action steps during the safety drill or incident</p>	<p>Spend time debriefing the safety drill or incident with the class Allow students to ask questions Identify how the class worked well together Move back into learning when class is ready</p>

DISASTER SERVICE WORKER

California Government Code, Section 3100, Title 1, Division 4, Chapter 4 states that public employees are Disaster Service Workers and are subject to such disaster service activities as may be assigned by their superiors or emergency service commanders. The term “public employees” includes all persons employed by the state or any county, city, city and county, state agency or public district. The law applies in the following cases:

- When a local emergency is proclaimed
- When a state of emergency is proclaimed
- When a federal disaster declaration is made

WHAT DOES A DISASTER SERVICE WORKER DO?

- Public employees serving in the role of Disaster Service Workers may be asked to do jobs other than their usual duties for periods exceeding normal work hours
- Employees may be scheduled in shifts and asked to return to the work site at hours outside the normal workday
- Disaster Service Workers will be deployed within the Incident Command System and may perform a variety of duties including oversight of shelter care, communications, logistics, first aid and comfort, or community support and safety
- When pressed into disaster service, employees' Workers Compensation coverage becomes the responsibility of state government (OES), but the employer pays the overtime. These circumstances apply only when a local or state emergency is declared.

To provide effective support as a Disaster Service Worker, employees must have confidence their own families are well prepared to deal with emergencies in their absence. The time and energy a staff member commits to being prepared at home will provide the best assurance they are capable of dealing with the emergency situation at the school/work site.

CALLING 911

Response is the process of implementing appropriate actions while an emergency situation is unfolding. In this phase, schools mobilize the necessary resources to address the emergency at hand. This may include calling or texting 911.

When calling 911, be prepared to remain on the phone and answer specific questions. In order to complete an accurate assessment of the situation, the 911 Dispatcher must obtain as much information as possible to best inform emergency responders and engage the appropriate level of medical response.

WHEN REPORTING AN EMERGENCY:

- Remain calm and speak slowly and clearly
- Be prepared to provide name, location of the incident, and caller's location, if different from the scene of the emergency
- Although caller ID information may transfer immediately to the 911 Dispatcher, it is not available in all locations. The 911 Dispatcher will confirm and verify the phone number and address for every call received.
- Answer all questions asked by the 911 Dispatcher, even those that seem repetitious
- Do not hang up until the Dispatcher says to do so

CALLING 911 FROM A CELL PHONE:

- Cell phone calls to 911 are often sent to a 911 answering point based on cell radio coverage. Cell coverage areas don't always match city boundaries.
- Know your cell phone number and be prepared to give the dispatcher an exact address

TEXT TO 911:

Text to 911 is the ability to send a text message to reach 911 emergency call takers from your mobile phone or device. However, because text to 911 is currently only available in certain locations, always make a voice call to contact 911 during an emergency whenever possible. Call if you can. Text if you can't.

When calling 911, time is of the essence. Remain calm; speak slowly and clearly. The 911 Dispatcher needs to gather the correct information the first time they ask for it.

SAFETY DRILLS AND EXERCISES

It is essential for school and district staff to conduct safety drills and engage in various preparedness exercises. Exercises should occur on a regular basis and include key school staff and local partners. A standardized and compliant emergency management plan utilizes a graduated approach to safety drills. Begin simply with orientation activities before advancing to more complex and sophisticated safety drills and exercises. Use safety drills and exercises to:

- Reveal gaps in preparedness
- Identify resource and supply needs
- Improve coordination between the school and community
- Clarify roles and responsibilities
- Increase overall level of emergency readiness, including response capacity of all staff and students

TYPES OF SAFETY DRILLS AND EXERCISES:

- **Orientation Seminar:** Introduces emergency policies and procedures to new staff and students, allows for discussion and clarifying questions
- **Tabletop Exercises:** Simulates an emergency situation in an informal, stress-free environment, elicits discussion and questions
- **Safety Drill:** Simulates an incident in a limited scope, tests function of emergency plan, initiates informal discussion of simulated emergencies
- **Functional Exercise:** Simulates a real emergency under time-sensitive conditions, tests and measures seldom-used resources
- **Full-Scale Exercise:** Tests an entire community's response capability, uses real equipment, takes place in "real time"

TRAUMA-INFORMED SAFETY DRILLS AND LESSON PLANS:

Students and staff may experience anxiety when anticipating and participating in safety drills. School leaders should take explicit steps to minimize the impact of safety drills on students and staff. Use a **TRAUMA-INFORMED** and developmentally appropriate approach to safety drills including using the Think On Your Feet: Big Five Lesson Plan for Lockdown/Barricade (which can be accessed at www.smcoe.org/schoolsafety).

- The Big Five Lesson Plan for Lockdown/Barricade helps students understand the Think on Your Feet concept and the immediate actions taken during a Lockdown/Barricade in a trauma informed and developmentally appropriate way. Lesson plans have corresponding activities, vocabulary words and visual aids, including the *Think-on-Your-Feet Peet*

SAFETY DRILLS AND EXERCISES

and the Slimeville Monsters book for TK-5th grade.

- Conduct Lockdown / Barricade safety drills only with adult staff when students are not present
- Consider conducting a tabletop exercise with adult staff
- Always announce safety drills in advance and prepare all participants as “surprise” safety drills can cause unnecessary panic
- Prioritize the most serious gaps and focus on the specific objectives
- Because children are sensitive to adult behavior, staff should be trained to exhibit confidence and remain calm during safety drills
- Make sure the school is ready for the type of safety drill planned
- Allow enough time for the exercise
- Gradually increase sophistication of exercises over time, but do not add unnecessary complications
- Adults should monitor students during the safety drill for signs of emotional distress and provide support accordingly
- Evaluate every exercise and conduct a debrief with staff and students

INCLUSIVE PRACTICES

This section lists inclusive practices that can be employed to assist students with ambulatory, cognitive, developmental, sensory, and mental health needs.

- Student needs will vary depending on the individual student
- It is important to model confidence and competence during a safety drill or emergency incident
- All students need to know that it is okay to feel afraid, sad, angry, or worried during an emergency incident and be encouraged to talk about what they are feeling or experiencing
- Consider creating an Individual Emergency Plan for each student

For students with unique needs, consider creating an Individual Emergency Plan for each student.

Student Group	Actions
All Students	<p>Work with students prior to the emergency incident occurring to prepare them. State expectations and outcomes in a developmentally appropriate way (using story boards, social narratives, the Big Five Books or Picture Exchange Systems, etc.)</p> <p>Identify the stressors/triggers for particular students (e.g. noise, chaotic environment, change in schedule, items out of place, hiding in particular locations, etc.)</p> <p>Use calming activities and soothing objects for students to hold (stuffed animal, stress ball, fidget spinner, etc.)</p> <p>If students use ASL, PECS, tablets or GoTalk for communication, use these for instructional commands during the incident</p>
Visual/Auditory Needs	<p>Use visual signals in conjunction with verbal commands (classroom signage, the Big Five Posters, desk sized visual aids related to the Big Five or even American Sign Language)</p> <p>Flash lights on and off to secure the student's attention after an announcement or when fire alarm is activated</p>
Non-Ambulatory Needs	<p>Students on crutches, canes or walkers should be evacuated as injured persons. Use a sturdy chair or one with wheels to move the student or help carry the person to the evacuation location</p> <p>Give priority assistance to wheelchair users</p> <p>Accompany students to the evacuation site and reunite with their ambulatory equipment as soon as safe to do so</p>

INCLUSIVE PRACTICES

Student Group	Actions
<p>Cognitive/Developmental Needs Sensory/Autism Needs Mental Health Needs</p>	<p>Use the student's reward/reinforcement systems to promote participation and following of directions</p> <p>Allow use of self-soothing behaviors, such as fidgeting, placing hands in pockets or hands in hair</p> <p>Speak slowly, whisper commands and avoid physical contact between others during safety drills and incidents if able to do so</p> <p>Provide earplugs/noise canceling headphones to decrease sensory input</p> <p>Allow students to use calming strategies during the emergency incident</p> <p>Be aware of students who may be vulnerable to stress or trauma. Provide appropriate and timely services or referrals after the emergency incident</p>

THINK ON YOUR FEET

In the event of an emergency, quick thinking is imperative for survival. During a crisis, an individual must think on their feet to determine the best course of action. These choices may include:

- Get off campus
- Hide
- Go into Lockdown/Barricade
- Protect/defend against an assailant in the most extreme circumstances

Understanding and practicing these options can help an individual respond decisively and in so doing, best ensure the safety and survival of self and others.

In the event of a Violent Intruder on campus, expect to hear noise from alarms, gunfire, explosions, and shouting. It is not uncommon for people experiencing a dangerous situation to first deny or rationalize the possible danger rather than respond. Quality training can help individuals think clearly and quickly during a chaotic scene. Proper training should include helping staff recognize the sounds of danger. Train staff and students to act decisively and remain flexible with a "think on your feet" approach.

LOOK, LISTEN AND LEAVE: FIRE ALARM

The **LOOK, LISTEN, AND LEAVE** protocol is an important action to practice when training the "think on your feet" mindset. At the sound of a fire alarm, staff and other leaders should take a moment to assess the scene before evacuating. The three steps of **LOOK, LISTEN, AND LEAVE** are:

- **LOOK** - open the classroom door and look out. Do you see or smell smoke or fire? Is the path to the pre-planned evacuation spot clear of obstacles? Do you notice anything out of the ordinary?
- **LISTEN** - in addition to the alarm, are there other sounds? Do you hear anything that would indicate it is unsafe to leave the room (explosions, panicked voices, the discharge of a weapon)?
- **LEAVE** - having determined it is safe to do so, direct students to leave the room toward the pre-determined evacuation spot.

IMMEDIATE ACTION RESPONSE: THE BIG FIVE

The Big Five is a set of **IMMEDIATE ACTION RESPONSES** intended to be implemented quickly in any variety of emergency situations. When an emergency occurs, it is critical that staff members take *immediate* steps to protect *themselves*, their *students*, and *other people* on campus.

Staff members must become familiar with each Immediate Action Response and be prepared to perform assigned responsibilities. All students must also be taught how to implement each of The Big Five protocols.

IMMEDIATE ACTION RESPONSE: THE BIG FIVE

BIG FIVE ACTION	WHEN	WHAT
SHELTER IN PLACE	Environmental hazards, dangerous air quality due to smoke or other contaminants, fire off-site, dangerous wildlife in the area, or severe weather	Isolate students and staff from the outdoor environment. Go inside. If hazard is airborne, close doors, windows, and air vents. Shut down air conditioning/heating units.
DROP, COVER AND HOLD ON	Earthquake, explosion, or falling debris	Protect students and staff from falling debris, drop to the floor, take cover under heavy furniture and hold on.
SECURE CAMPUS	Potential threat of violence in the surrounding community and/or police activity off-campus and nearby	Calmly direct all staff/students indoors. Close and lock all classrooms/office doors. Continue instruction as planned. Remain indoors until otherwise directed.
LOCKDOWN/ BARRICADE	Violent intruder on campus	Immediately seek safety indoors. Once inside, lock and barricade all doors. Cover windows and turn off lights. Remain quiet and alert. No one is allowed to enter or exit for any reason unless directed by law enforcement.
EVACUATION	Bomb threat, chemical/gas leak, fire inside the building or nearby premises, severe weather alert, after an earthquake or explosion, or when implementing Student Release/Reunification	Use the "Look, Listen, and Leave" protocol. Once it is deemed safe to exit buildings, lead students and school staff from school buildings to a predetermined location.



SHELTER IN PLACE

SHELTER IN PLACE is implemented to isolate students and staff from the outdoor environment and prevent exposure to airborne contaminants or threats posed by wildlife or other environmental hazards. The procedures may necessitate 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 is considered appropriate for, but is not limited to, the following types of emergencies:

- External chemical release
- Fire in the community
- Hazardous material spills
- Unhealthy air quality outside
- Dangerous wildlife on or near campus

A Shelter-in-Place response may require that HVAC systems be shut down to provide protection from contaminated outside air. Students and staff may freely move about inside the buildings, but no one should leave the protected space until directed by fire officials, law enforcement, or site administration.

SHELTER IN PLACE:

- All heating, air conditioning, and ventilation systems may need to be shut down immediately depending on the hazard
- All pilot lights and sources of flame may need to be extinguished
- Any gaps around doors and windows may need to be sealed
- Allows for free movement within classrooms or offices

SHELTER IN PLACE



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. Support those needing special assistance.
- If directed by Incident Command, secure individual classrooms: a) close doors and windows; b) shut down the classroom HVAC system to; c) turn off fans; d) seal gaps under doors and windows with wet towels, duct tape, or other materials if instructed by School Incident Commander
- Take attendance and call or email attendance report to school secretary or according to site protocol
- Wait for another action or, if **ALL CLEAR** announcement is issued, return to class routine



DROP, COVER, AND HOLD ON

DROP, COVER AND HOLD ON is the immediate action taken in the event of an earthquake or explosion and protects students and staff from flying and falling debris. It is an appropriate action for, but is not limited to, the following types of emergencies:

- Earthquake
- Explosion

In the event of an explosion, earthquake, or other event causing falling debris, immediately “**DROP, COVER, and HOLD ON.**” Students and staff should drop to the floor, duck under a sturdy desk or table, cover the head with arms and hands, and hold onto furniture. Turn away from windows to stay clear of breaking glass. Individuals in wheelchairs can secure against an interior wall and lock the wheels. Protect head by covering with arms if possible.

DROP, COVER, AND HOLD ON:

- Must be practiced for immediate and automatic response
- Is the single most useful action to protect from injury in an earthquake
- In the event it is impossible to duck under sturdy furniture, continue to cover face and head with arms and hold onto something sturdy
- Most injuries in earthquakes are caused by breaking glass or falling objects
- Fire alarms and sprinkler systems may go off in buildings during an earthquake, even if there is no fire
- Stay alert to aftershocks
- Assist those with special needs to ensure safe cover for all
- Evacuate **only** if there is damage to the building, the building is on fire, or location is in a tsunami zone

DROP, COVER, AND HOLD ON



STAFF ACTIONS - INSIDE:

- At first recognition of an earthquake, instruct students to move away from windows
- Initiate **DROP, COVER, AND HOLD ON** procedures. 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.
- Move as little as possible. However, if a person is unable to find protection under sturdy furniture, direct them to shelter against an interior wall and turn away from windows and other glass.
- Each time an aftershock is felt, **DROP, COVER, AND HOLD ON**. Aftershocks frequently occur minutes, days, even weeks following an earthquake.
- When it appears safe to release from **COVER**, assess any injuries and/or damage and report status to Incident Commander according to site communications protocol. Be prepared to call 911 directly if necessary.
- Wait for further instructions from School Incident Commander or First Responders or if that seems unlikely and building is compromised, evacuate students to predetermined Evacuation Assembly Area



DROP, COVER, AND HOLD ON

STAFF ACTIONS - OUTSIDE:

- Find a clear spot and drop to the ground. (Stay away from buildings, power lines, trees, and streetlights, etc.)
- Commence **DROP AND COVER** in the **DROP, COVER, AND HOLD ON** procedures
- Place head between the knees; cover back of neck with arms and hands
- Remain in place until shaking stops or for at least 20 seconds
- Each time an aftershock is felt, **DROP AND COVER**. Aftershocks frequently occur minutes, days, even weeks following an earthquake.
- When it appears safe to move, report location, injuries and/or any damage to School Incident Commander according to site communications protocol
- Wait for further instructions from School Incident Commander or First Responders, or if that seems unlikely, evacuate students to predetermined Evacuation Assembly Area

SECURE CAMPUS



SECURE CAMPUS is implemented when the threat of violence or police action in the surrounding community requires precautionary measures to ensure the safety of staff and students. When a campus is in **SECURE CAMPUS** status, classroom instruction and/or activity should continue and all students and staff remain inside *through the duration of the event*, except for essential needs. Outer gates and other entrance/exit points can be closed (**NOT LOCKED**) to deter a potential perpetrator from entering school grounds.

During a Secure Campus, the Incident Command Team or staff assigned by the Incident Command Team shall assist in escorting students and staff who may need to leave the classroom for Essential Needs. Essential Needs can include but are not limited to the following:

- Bathrooming/Toileting
- Medical Attention/Response
- Mental Health/Wellness Needs/Response

This response is considered appropriate for, but not limited to, the following types of emergencies:

- Potential threat of violence in the surrounding community
- Law enforcement activity in the surrounding community

A **SECURE CAMPUS** response may be elevated to **LOCKDOWN / BARRICADE** as circumstances demand in which case instruction immediately ceases and students and staff follow **LOCKDOWN / BARRICADE** procedures.

Secure Campus allows for instruction to continue while the school takes preventative action in the event of a threat in the neighborhood surrounding a school. Lock all classroom/office doors, close entrance and exit points on the school's perimeter, and continue classroom instruction.



LOCKDOWN / BARRICADE

LOCKDOWN / BARRICADE is implemented when the imminent threat of violence or gunfire is identified on the campus, or the school is directed to do so by law enforcement. During **LOCKDOWN / BARRICADE**, students are to always remain in designated classrooms or lockdown locations. Do not evacuate until room is cleared by law enforcement or site administration. This response is considered appropriate for, but not limited to, the following types of emergencies:

- Gunfire
- Threat of extreme violence outside the classroom

During a **LOCKDOWN / BARRICADE**, remember that immediate safety from the violent intruder is the priority and guides all actions, above all other concerns.

Lockdown/Barricade requires closing and locking doors and barricading with heavy objects. No one is allowed to enter or exit until door-to-door release by law enforcement or School Incident Commander who will unlock door from the outside with keys.

LOCKDOWN / BARRICADE:

- Is a response to an immediate danger; it is not preceded by any warning
- Demands quick action; an active shooter, for example, can fire one round per second
- Requires common sense thinking under duress; do what must be done to best ensure survival of students and staff
- If it is possible to safely get off campus with students, take that action immediately (Escape/Get Off Campus)
- If it is not possible to get off campus, quickly lockdown inside a safe room and barricade the entrance (Hide/Lockdown/Barricade)
- Once a room is secured, no one is allowed to enter or exit under any circumstances
- Prioritize clear communication
- In the extreme instance that a Violent Intruder is able to enter a room, occupants should be prepared to protect or defend by any means necessary (Protect/Defend)



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:

- Bomb threat
- Chemical accident
- Explosion or threat of explosion
- Fire
- Earthquake

In the event of an explosion, earthquake, or other event causing falling debris, **EVACUATION** will be preceded by a “**DROP, COVER, and HOLD ON**” protocol. Students and staff should drop to the floor, duck under a desk or table, cover the head with arms and hands, and hold onto furniture.

THINK ON YOUR FEET: LOOK, LISTEN, AND LEAVE - FIRE ALARM

Before evacuation, take a moment to look outside the door for any potential dangers. Listen for anything unusual that might pose a safety risk. Once it's determined the path is safe, evacuate the office or classroom to a designated safe area.

EVACUATION:

- Requires exit from the building to a designated safe site, on-campus or off-site
- May require that students and staff rely on district bus transportation
- May require staff to exit via alternate routes based on circumstances
- Requires that students remain with assigned teachers unless circumstances prohibit it
- Requires that staff and students assist those with special needs to ensure for safe egress of all

EVACUATION



EVACUATION ROUTES:

Take care in choosing a designated evacuation area. Consider whether there is a clear route to the area from all parts of the campus, and whether it is far enough away in the case of a fire or gas leak, but close enough to be reached on foot. Consider also having multiple designated evacuation areas in the event one is obstructed or otherwise becomes unsafe during an emergency. Make sure there is a clear, unblocked path onto campus for emergency vehicles. Be sure to include evacuation to designated area(s) as part of safety drills and training.

STAFF ACTIONS:

- Prepare students to leave all belongings and calmly exit the building
- Gather emergency supplies/materials (Go Bag, p. 39) including the student roster for current class and that of “Buddy Teacher” (p. 40)
- Remove staff ID placard from emergency materials and put it on
- Take in-room attendance as students are leaving
- Ensure the door is closed. Leave the door unlocked if possible.
- Check with “Buddy Teacher(s)” to determine each other’s health status, need to assist with injuries, need to stay with injured students, responsibility to ICS duty, etc.
- If necessary, one “Buddy Teacher” will evacuate both classrooms
- Take care to ensure the safety and address the unique needs of students or staff with disabilities according to site protocol
- Emphasize that the class stay together en route to the Evacuation Assembly Area
- According to site protocol, take attendance using evacuation attendance forms once class is safely in assembly location
- According to site protocol, report missing students
- Remain in the Evacuation Assembly Area until further instruction
- Wait for another action or, if **ALL CLEAR** announcement is issued, return to school buildings and normal class routine

FIRST AID: TRIAGE

First Aid response is an important part of any emergency response plan and should be developed in cooperation with partner agencies including local Emergency Medical Services, local hospitals, and the health department. All employees should be trained, and staff roles should be clearly defined and integrated into the site's written plan.

THE BASICS OF FIRST AID RESPONSE:

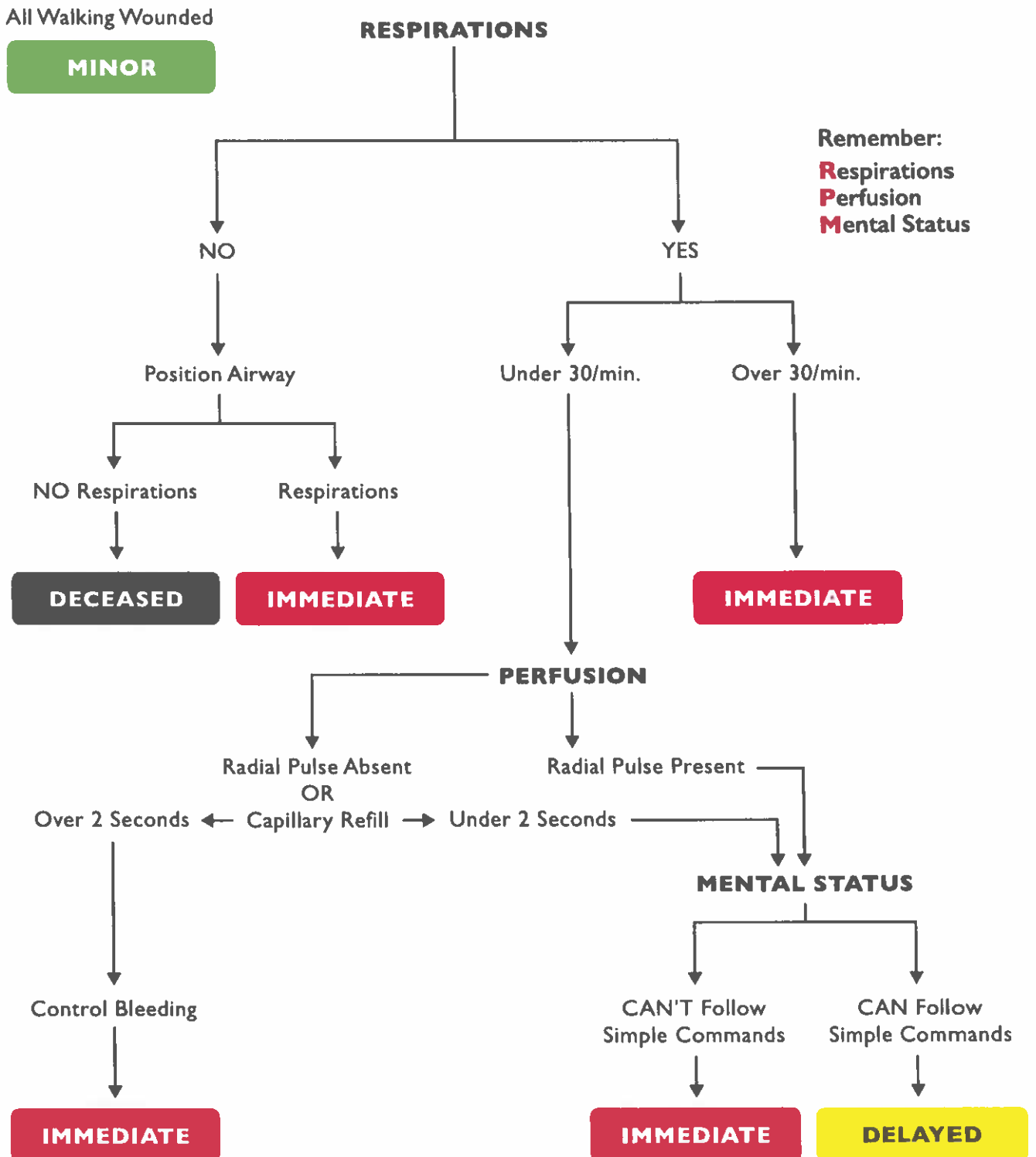
- Remain calm and assess the situation
- Be sure the situation is safe for the responder
- In the case of serious injury involving difficulty breathing, loss of consciousness, uncontrolled bleeding, head injury, or possible poisoning, call **911** immediately
- Do NOT move a severely injured or ill person unless necessary for immediate safety
- If moving is necessary, protect the neck by keeping it straight to prevent further injury

RECOMMENDED FIRST AID EQUIPMENT AND SUPPLIES FOR SCHOOLS:

1. Portable stretcher and cot with waterproof cover
2. Ten Triage Tags
3. Blankets, sheets/pillows/pillowcases (disposable covers are suitable)
4. Wash cloths, hand towels, and small portable basin
5. Covered waste receptacle with disposable liners
6. Bandage scissors, tweezers
7. Disposable thermometer
8. Pocket mask/face shield for CPR
9. Disposable latex free gloves
10. Cotton-tipped applicators, individually packaged
11. Assorted adhesive bandages (1" x 3")
12. Gauze squares (2" x 2"; 4" x 4"), individually packaged
13. Trauma Pads (5" x 9")
14. Adhesive tape (1" width)
15. Gauze bandage (2" and 4" widths) rolls
16. Ace bandage (2" and 4" widths)
17. Splints (long and short)
18. Quick clot dressing
19. Cold packs
20. Triangular bandages for sling and safety pins
21. Tongue blades
22. Disposable facial tissues, paper towels, sanitary napkins
23. One flashlight with spare bulb and batteries

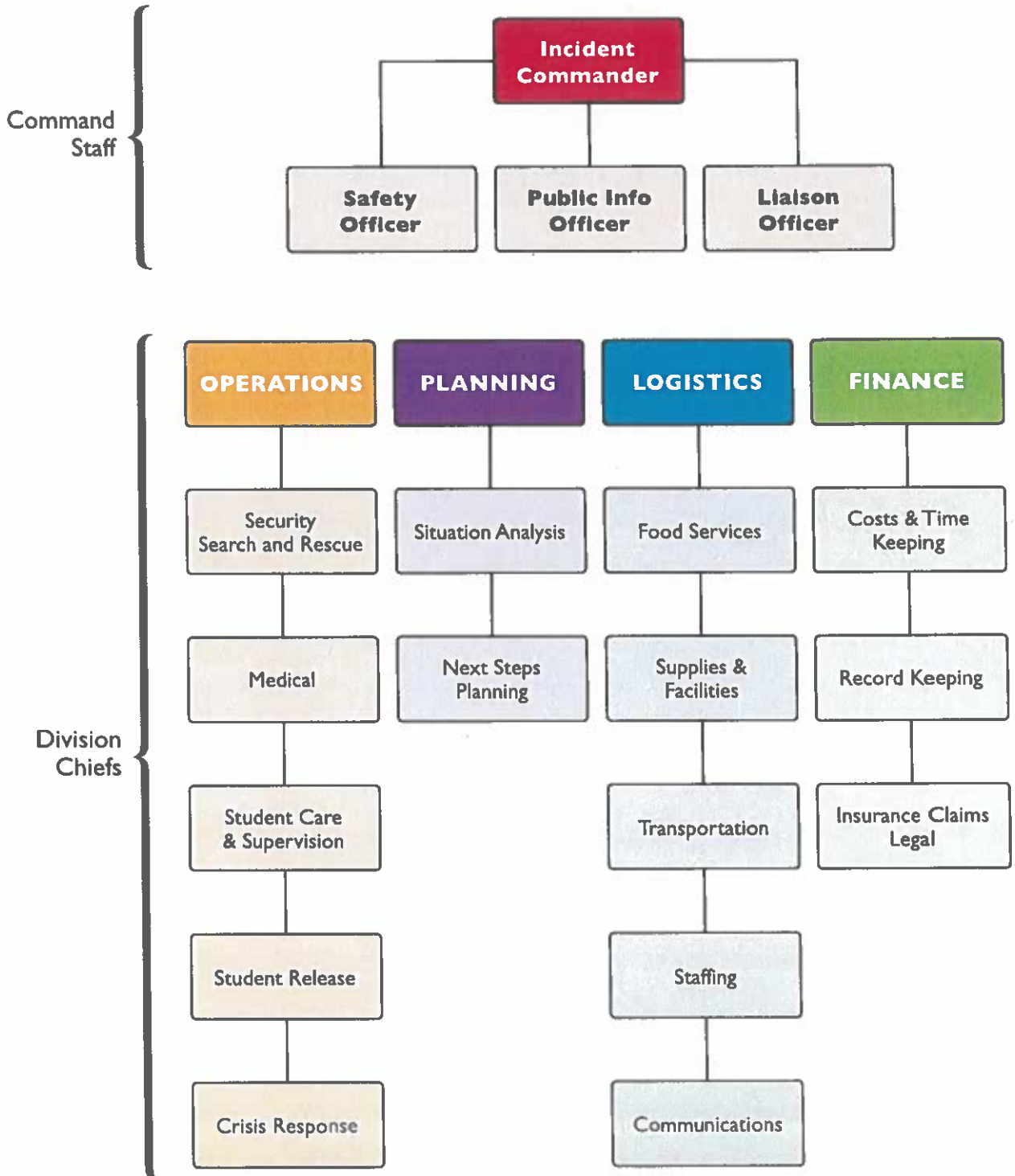
FIRST AID: TRIAGE

In **TRIAGE**, patients are classified with a color tag to indicate the level of urgency. Those colors are displayed in this diagram.



SCHOOL INCIDENT COMMAND CHART

This chart should be used as a guide for school sites and districts to plan their Incident Command Structure. At a school site, the flexibility for each role is paramount as staff may not be on site or able to perform duties during an emergency. For an explanation of roles and job duty expectations, please see the *ICS Cards and Roles*.



GO BAG

Each classroom should maintain an up-to-date Go Bag. Each teacher is responsible to monitor the contents of their classroom's Go Bag and to obtain any materials that need replacing or updating. While other appropriate items might be included, each Go Bag must contain the following:

#	Item	Verified (Date)	Verified (by Whom)
1	Updated Class Lists		
2	"Buddy" Class Lists		
3	In-Room Attendance Forms		
4	Evacuation Attendance Forms		
5	Staff ID Placard		
6	Teacher Name Sign		
7	Evacuation Routes Map		
8	Red Cross Placard		
9	Pens/Pencils		
10	Individual Safety Plans of Students with Special Needs		
11	Comforting Objects for Students		
12	Transition Markers/Surprise Cards		
13	Snacks (optional, depending on class)		

BUDDY TEACHER LIST

Use the chart below to assign Buddy Teachers for emergency evacuation purposes. Each teacher is responsible for assisting the Buddy Teacher's class evacuate should the need arise. The classroom Go Bag should contain current rosters for both classrooms.

BUDDY TEACHER ASSIGNMENTS

#	Teacher	Room No.	Teacher	Room No.
1				
2				
3				
4				
5				
6				
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