

**Redwood Coast Montessori Board of Directors**

793 K Street, Arcata, CA 95521 (Room 5)

**Zoom Meeting Link:**

(<https://us06web.zoom.us/j/83949283639?pwd=KecqjBr0hF75piX1N8kmqjluurBjFw.1>)

**REGULAR MEETING**

September 11, 2024 6:30 p.m.

**AGENDA**

- A. CALL TO ORDER OF OPEN SESSION
- B. OPEN SESSION: 6:30 P.M. LOCATION: REDWOOD COAST MONTESSORI, 793 K Street, Arcata, CA 95521
- C. PUBLIC COMMENT  
The public is invited to make announcements or comment on information to the Board that is relevant to the scope of authority of Redwood Coast Montessori. The Board may uniformly impose a time limit of 3 minutes to individual presentations to assure every subject is heard. By public law, the Board cannot take action on items not on the agenda.
- D. GENERAL FUNCTION-CONSENT ITEMS– Approval w/ Single Motion:  
Items listed under the Consent Agenda are considered to be routine and are acted on by the Board in one motion. There is no discussion of these items before the Board vote unless a member of the Board, staff, or public requests specific items be discussed and/or removed from the Consent Agenda. It is understood that the Administration recommends approval on all Consent Items.
  - 1. Approval of Draft Minutes of June 19, 2024 Regular Meeting
  - 2. Approval of Draft Minutes of June 20, 2024 Special Meeting
  - 3. Approval of new hires (certificated)
    - a. Dakota Adelman (1.0 FTE high school history teacher)
    - b. Lucera Love (1.0 FTE resource specialist teacher)
    - c. Sarah Pruden (0.45 FTE speech therapist)
  - 4. Approval of new hires (classified)
    - a. Ayden Martin (1:1 assistant)
    - b. Bee Langholz (lower el assistant)
    - c. Christian Richardson (afterschool assistant)
    - d. Dante Ayala (upper el assistant)
    - e. Garret Davidson (adolescent assistant)
    - f. Grace Ross (TK/Kg assistant)
    - g. Emily Sturrock (upper el assistant)
- E. BUSINESS AND FINANCE - ITEMS FOR REPORT, DISCUSSION, AND POSSIBLE ACTION
  - 1. Unaudited Actuals
  - 2. Stipend request form and stipend rates
- F. SCHOOL FUNCTIONS - ITEMS FOR REPORT, DISCUSSION, AND POSSIBLE ACTION
  - 1. Williams Act Update
  - 2. WASC visit Update
  - 3. Discuss Board Retreat
  - 4. Workplace Violence Protection Plan (WVPP)
- G. STAFF AND DIRECTORS REPORTS - ITEMS FOR REPORT, DISCUSSION
  - 1. Staff Report
  - 2. Director Reports
- H. FUTURE AGENDA ITEMS

**ADJOURNMENT OF OPEN SESSION**

NOTICE: Any writing, not exempt from public disclosure under Government Code Section 6253.5, 6254, 6254.3, 6254.7, 6254.15, 6254.16, OR 6254.22, which is distributed to all or a majority of the members of the governing board by any person in connection with a matter subject to discussion or consideration at an open meeting of the board is available for public inspection at the Redwood Coast Montessori School 1611 Peninsula Drive, Arcata, CA 95521. In compliance with Government Code section 54954.2(a) Redwood Coast Montessori will, on request make agendas available in appropriate alternative formats to persons with a disability, as required by Section 202 of the Americans with Disabilities Act of 1990 (42 U.S.C. Sec. 12132), and the federal rules and regulations adopted in implementation thereof. Individuals who need this agenda in an alternative format or who need a disability-related modification or accommodation in order to participate in the meeting should contact Redwood Coast Montessori at 707-832-4194.

Redwood Coast Montessori Board of Directors  
Regular Meeting

Zoom (<https://us06web.zoom.us/j/83073560631?pwd=d2xMRHN2bFRHY2w3Wng0NG5kdExNUT09>)

REGULAR MEETING

June 19, 2024 6:30 p.m.

MINUTES

A. CALL TO ORDER OF OPEN SESSION by Kim Bonine at 6:30 p.m.

- a. Present: Libbi Miller, Kim Bonine (arrived late), Susann Goodman, Terry Weeks

B. PUBLIC COMMENT - No public comments

C. GENERAL FUNCTION – [Action Item]

1. Approval of general consent items: M/S by Weeks/Goodman to approve the General Function-Consent Items. Board: ayes 3, noes 0. Motion carried.

D. BUSINESS AND FINANCE

1. Prop. 28: Arts & Music in Schools Funding Annual Report: M/S by Weeks/Goodman to approve the 2024 annual Prop 28 site report. Board: ayes 4, noes 0. Motion carried.
2. 2024-25 ConApp: M/S by Weeks/Bonine to approve the 24-25 24-25 ConApp. Board: ayes 4, noes 0. Motion carried.
3. Public Hearing: 2024/2025 DRAFT Local Control Accountability Plan (LCAP) - Solicitation, Recommendation, and Comments from Members of the Public  
Open: 6:38 p.m.  
Close: 6:53 p.m.
4. Public Hearing: Local Control Funding Formula (LCFF) 2024/2025 Budget - Solicitation, Recommendation, and Comments from Members of the Public  
Open: 6:53 p.m.  
Close: 6:58 p.m.
5. Public Hearing: 2024/2025 Education Protection Account  
Open: 6:59 p.m.  
Close: 7:02 p.m.
6. Approval of CalSHAPE Grant to repair/replace existing plumbing fixtures at Manila campus: M/S by Goodman/Weeks to approve the CalSHAPE Grant. Board: ayes 4, noes 0. Motion carried.

E. SCHOOL FUNCTIONS

1. Declaration of Need: M/S by Goodman/Bonine to approve the Declaration of Need. Board: ayes 4, noes 0. Motion carried.
2. Staff Progressive Discipline Policy: M/S by Bonine/Goodman to approve the Staff discipline warning document with the following changes: change “warning” to “notice”; update handbook [section VII (B)] to including process of discipline notice. Board: ayes 4, noes 0. Motion carried.
3. School Board Meeting dates for 2024-25: M/S by Goodman/Bonine to set the regular school board meeting date for the second Wednesday of each month at 6:30 p.m. The first meeting will take place on August 14<sup>th</sup> at the Arcata campus. Board: ayes 4, noes 0. Motion carried.
4. Board Retreat: M/S by Goodman/Weeks to hold a governance board retreat on Wednesday September 4<sup>th</sup> from 5:30 to 7:30 p.m. in Arcata. Board: ayes 4, noes 0. Motion carried.

J. STAFF AND DIRECTOR REPORTS

1. Staff: Michelle and Bryan presented information about recent events that have been taking place at both campuses.
2. Directors: None

K. FUTURE AGENDA ITEMS

L. ADJOURNMENT OF OPEN SESSION

M. CLOSED SESSION – M/S by Weeks/Goodman to adjourn the June 19<sup>th</sup> regular meeting..  
Board: ayes 4, noes 0. Motion carried at 7:58 p.m.

Redwood Coast Montessori Board of Directors  
Regular Meeting

Zoom (<https://us06web.zoom.us/j/83073560631?pwd=d2xMRHN2bFRHY2w3Wng0NG5kdExNUT09>)

SPECIAL MEETING

June 20, 2024 6:30 p.m.

MINUTES

A. CALL TO ORDER OF OPEN SESSION by Kim Bonine at 6:30 p.m.

a. Present: Libbi Miller, Kim Bonine, Susann Goodman, Terry Weeks

B. PUBLIC COMMENT - No public comments

C. GENERAL FUNCTION – [Action Item]

1. None

D. BUSINESS AND FINANCE.

1. Approval of 2023-24 Local Indicator Self-Reflection for Redwood Coast Montessori: M/S by Weeks/Goodman to approve the 24-25 Local Indicator Self-Reflection for RCM: ayes 4, noes 0. Motion carried.
2. Approval of the 2024/2025 Local Control Accountability Plan (LCAP): M/S by Weeks/Bonine to approve the 24-25 LCAP: ayes 4, noes 0. Motion carried.
3. Approval of 2024/2025 Local Control Accountability Plan (LCAP) Federal Addendum: M/S by Bonine/Goodman to approve the 24-25 LCAP Federal Addendum: ayes 4, noes 0. Motion carried.
4. Approval of the Local Control Funding Formula (LCFF) 2024/2025 Budget: M/S by Goodman/Weeks to approve the 24-25 LCFF: ayes 4, noes 0. Motion carried.
5. Approval of 2024/2025 Education Protection Account: M/S by Goodman/Bonine to approve the 24-25 Education Protection Account: ayes 4, noes 0. Motion carried.

E. PUBLIC COMMENT ON CLOSED SESSION ITEMS – No public comment

F. CLOSED SESSION: 7:00 PM

1. Public Employee Review (Administrative Staff)

H. OPEN SESSION: 8:00 P.M.

I. ANNOUNCEMENT OF ANY REPORTABLE ACTION TAKEN IN CLOSED SESSION - No action was taken

J. ADJOURNMENT OF OPEN SESSION

# RCM School Board



Agenda Item: E1

Approval of 2023-24 Unaudited Actuals

Department/Program:

School wide

Background Information:

Unaudited actuals for all 2023-24 expenses were compiled.

Recommendation:

Accept 2023-24 Unaudited Actuals

Fiscal Implications:

None

Contact Person:

Bryan Little

**REDWOOD COAST MONTESSORI CHARTER SCHOOL****CHARTER FUND 10**

2023-24 Unaudited Actuals

	<b>2023-24 Budget</b>	<b>2023-24 Actuals</b>	<b>Diff +/-</b>	<b>Diff %</b>
<b>A. REVENUES</b>				
LCFF (revenue limit sources)	2,121,380	2,121,380	-	0.00%
Federal Sources	129,366	118,247	(11,119)	-8.59%
Other State Sources	647,042	605,607	(41,435)	-6.40%
Other Local Sources	341,624	343,616	1,992	0.58%
<b>Total Revenue</b>	<b>3,239,412</b>	<b>3,188,850</b>	<b>(50,562)</b>	<b>-1.56%</b>
<b>B. EXPENDITURES</b>				
Certificated Salaries	1,274,136	1,280,465	6,329	0.50%
Classified Salaries	370,697	382,775	12,078	3.26%
Employee Benefits	849,009	851,832	2,823	0.33%
Supplies	126,307	90,130	(36,177)	-28.64%
Services & Other Operating	595,657	593,584	(2,073)	-0.35%
Capital Outlay	100,000	91,252	(8,748)	-8.75%
Other Outgo (excl Transfers of Indirect Costs)	2,049	2,049	-	0.00%
Transfers of Indirect Costs	-	(0)	(0)	
<b>Total Expenditures</b>	<b>3,317,855</b>	<b>3,292,088</b>	<b>(25,767)</b>	<b>-0.78%</b>
<b>C. EXCESS REVENUES (EXPENDITURES)</b>	<b>(78,443)</b>	<b>(103,237)</b>	<b>(24,794)</b>	<b>131.61%</b>
<b>D. OTHER FINANCING SOURCES/USES</b>				
Interfund Transfers In	-	-	-	
Interfund Transfers Out (to special reserve)	-	-	-	
Other Sources	-	-	-	
Other Uses	-	-	-	
<b>Total Other Sources (Uses)</b>	<b>-</b>	<b>-</b>	<b>-</b>	
<b>E. FUND BALANCE INCREASE (DECREASE)</b>	<b>(78,443)</b>	<b>(103,237)</b>	<b>(24,794)</b>	<b>31.61%</b>
Audited Beginning Balance	636,242	636,240		
Other Restatements	-	(214)	(214)	
<b>F. ADJUSTED BEGINNING BALANCE</b>	<b>636,242</b>	<b>636,026</b>	<b>(216)</b>	<b>-0.03%</b>
<b>G. ENDING BALANCE</b>	<b>557,799</b>	<b>532,789</b>	<b>(25,010)</b>	<b>-4.48%</b>

**Fund 10 - REDWOOD COAST MONTESSORI**

**Fiscal Year 2023/24 Through June 2024**

Object	Description	Adopted Budget	Revised Budget	Revenue	Balance	% Rcvd
<b>Revenue Detail</b>						
<b>LCFF Revenue Sources</b>						
8011	REVENUE LIMIT ST AID-CURR YR	1,640,812.00	1,690,399.00	1,673,089.00	17,310.00	98.98
8012	REVENUE LIMIT-EPA	34,390.00	35,704.00	35,704.00		100.00
8096	TRANSFERS>CHARTERS IN LIEU TAX	356,584.00	395,277.00	412,587.00	17,310.00-	104.38
	<b>Total LCFF Revenue Sources</b>	<b>2,031,786.00</b>	<b>2,121,380.00</b>	<b>2,121,380.00</b>	<b>.00</b>	<b>100.00</b>
<b>Federal Revenue</b>						
8220	CHILD NUTRITION PROGRAMS		26,506.00	21,243.05	5,262.95	80.14
8221	NATIONAL LUNCH PROGRAM	42,000.00	44,000.00	36,089.45	7,910.55	82.02
8222	FEDERAL SCHOOL BREAKFAST	6,000.00	4,000.00	4,330.14	330.14-	108.25
8290	ALL OTHER FEDERAL REVENUES	40,015.00	47,659.00	49,384.27	1,725.27-	103.62
8295	ALL FEDERAL REV PRIOR YEAR	13,920.00	7,201.00	7,200.32	.68	99.99
	<b>Total Federal Revenue</b>	<b>101,935.00</b>	<b>129,366.00</b>	<b>118,247.23</b>	<b>11,118.77</b>	<b>91.41</b>
<b>Other State Revenues</b>						
8520	CHILD NUTRITION	59,000.00	96,095.00	104,207.94	8,112.94-	108.44
8521	STATE BREAKFAST PROGRAM	10,000.00	6,000.00	7,212.95	1,212.95-	120.22
8550	MANDATED COST REIMBURSEMENTS	4,003.00	4,813.00	4,813.00		100.00
8560	STATE LOTTERY REVENUE	42,423.00	46,314.00	61,658.85	15,344.85-	133.13
8590	ALL OTHER STATE REVENUES	294,390.00	377,637.00	387,743.80	10,106.80-	102.68
8595	ALL OTHER STATE REV-PRIOR YR	21,018.00	116,183.00	39,970.57	76,212.43	34.40
	<b>Total Other State Revenues</b>	<b>430,834.00</b>	<b>647,042.00</b>	<b>605,607.11</b>	<b>41,434.89</b>	<b>93.60</b>
<b>Other Local Revenue</b>						
8634	FOOD SERVICES SALES	1,000.00	1,000.00		1,000.00	
8660	INTEREST	4,000.00	4,000.00	14,638.52	10,638.52-	365.96
8662	NET INC/DEC IN FAIR VALUE		26,497.00	15,363.00	11,134.00	57.98
8699	ALL OTHER LOCAL REVENUES	115,045.00	131,390.00	134,877.45	3,487.45-	102.65
8792	TRANS OF APPORTION FROM COE	178,432.00	178,737.00	178,737.00		100.00
	<b>Total Other Local Revenue</b>	<b>298,477.00</b>	<b>341,624.00</b>	<b>343,615.97</b>	<b>1,991.97-</b>	<b>100.58</b>
	<b>Total Year To Date Revenues</b>	<b>2,863,032.00</b>	<b>3,239,412.00</b>	<b>3,188,850.31</b>	<b>50,561.69</b>	<b>98.44</b>

Object	Description	Adopted Budget	Revised Budget	Encumbrance	Actual	Balance	% Used
<b>Expenditure Detail</b>							
<b>Certificated Salaries</b>							
1100	TEACHERS SALARIES - REGULAR	880,632.00	987,620.00		987,341.18	278.82	99.97
1102	MUSIC TEACHER	22,411.00	22,411.00		22,410.50	.50	100.00

Selection Grouped by Account Type - Sorted by Org, Fund, Object, Filtered by (Org = 2, Starting Period = 1, Ending Account Period = 0, Stmt Option? = , Zero Amounts? = N, SACS? = N, Restricted? = Y, Fund = 10)

Fund 10 - REDWOOD COAST MONTESSORI

Fiscal Year 2023/24 Through June 2024

Object	Description	Adopted Budget	Revised Budget	Encumbrance	Actual	Balance	% Used
<b>Expenditure Detail (continued)</b>							
<b>Certificated Salaries (continued)</b>							
1104	SPECIAL ED TEACHER	61,702.00	69,520.00		69,519.10	.90	100.00
1132	COACHES AND SPECIAL ADVISORS		1,570.00		1,570.00		100.00
1134	MENTOR TEACHER		1,250.00		1,250.00		100.00
1140	TEACHER SALARY - SUBSTITUTES	6,000.00	6,000.00		11,360.00	5,360.00-	189.33
1150	TEACHER SALARY - OTHER PAY	14,000.00	18,001.00		19,250.38	1,249.38-	106.94
1200	CERT PUPIL SUPPORT SAL - REG	41,135.00	46,346.00		46,346.10	.10-	100.00
1303	PRINCIPAL	61,558.00	61,558.00		61,558.08	.08-	100.00
1307	SUPERVISORS SALARIES	58,295.00	59,860.00		59,859.80	.20	100.00
	<b>Total Certificated Salaries</b>	<b>1,145,733.00</b>	<b>1,274,136.00</b>	<b>.00</b>	<b>1,280,465.14</b>	<b>6,329.14-</b>	<b>100.50</b>
<b>Classified Salaries</b>							
2100	CLASS INSTR AIDE SAL-REGULAR	140,104.00	129,558.00		125,102.78	4,455.22	96.56
2103	CLASS INSTR AIDE SAL-SPEC ED	59,128.00	33,641.00		32,232.82	1,408.18	95.81
2130	CLASS INSTR AIDE-EXTRA ASSGN		2,700.00		10,080.50	7,380.50-	373.35
2150	CLASS INSTR AIDE-OTHER PAY	6,000.00	3,700.00		5,874.81	2,174.81-	158.78
2160	COACHES & ADVISORS	500.00	1,000.00		500.00	500.00	50.00
2210	FOOD SERVICE PERSONNEL	25,050.00	33,987.00		38,296.91	4,309.91-	112.68
2214	CUSTODIAN	27,336.00	26,378.00		26,898.30	520.30-	101.97
2250	CLASS PUPIL SUPPORT-OTH PAY				600.05	600.05-	NO BDGT
2304	BUSINESS MANAGER	25,243.00	25,243.00		25,243.08	.08-	100.00
2308	DIRECTOR	29,510.00	41,736.00		40,980.90	755.10	98.19
2403	CLERICAL TECHNICIAN	12,647.00	9,781.00		14,359.78	4,578.78-	146.81
2407	ASSISTANT	8,184.00	7,974.00		7,923.65	50.35	99.37
2900	OTHER CLASS SALARIES-REGULAR	33,406.00	15,154.00		16,695.05	1,541.05-	110.17
2902	RECREATION WORKER	13,462.00	13,400.00		11,371.05	2,028.95	84.86
2931	PROJECT MANAGER	27,562.00	26,445.00		24,615.31	1,829.69	93.08
2950	OTHER CLASS SALARIES-OTH PAY				2,000.00	2,000.00-	NO BDGT
	<b>Total Classified Salaries</b>	<b>408,132.00</b>	<b>370,697.00</b>	<b>.00</b>	<b>382,774.99</b>	<b>12,077.99-</b>	<b>103.26</b>
<b>Employee Benefits</b>							
3101	STRS - CERTIFICATED	294,368.00	295,656.00		305,537.61	9,881.61-	103.34
3102	STRS - CLASSIFIED				209.25	209.25-	NO BDGT
3201	PERS - CERTIFICATED	12,885.00	16,059.00		15,446.70	612.30	96.19
3202	PERS - CLASSIFIED	106,552.00	90,883.00		92,390.47	1,507.47-	101.66
3311	SOCIAL SECURITY-CERTIFICATED	9,323.00	4,408.00		4,720.97	312.97-	107.10
3312	SOCIAL SECURITY-CLASSIFIED	25,305.00	22,965.00		23,662.50	697.50-	103.04
3331	MEDICARE-CERTIFICATED	16,497.00	18,416.00		18,508.35	92.35-	100.50

Selection Grouped by Account Type - Sorted by Org, Fund, Object, Filtered by (Org = 2, Starting Period = 1, Ending Account Period = 0, Stmt Option? = , Zero Amounts? = N, SACS? = N, Restricted? = Y, Fund = 10)



**Fund 10 - REDWOOD COAST MONTESSORI**

**Fiscal Year 2023/24 Through June 2024**

Object	Description	Adopted Budget	Revised Budget	Encumbrance	Actual	Balance	% Used
<b>Expenditure Detail (continued)</b>							
<b>Employee Benefits (continued)</b>							
3332	MEDICARE-CLASSIFIED	5,918.00	5,370.00		5,544.85	174.85-	103.26
3411	HEALTH & WELFARE BENEFITS-CRT	345,784.00	329,460.00		319,459.74	10,000.26	96.96
3412	HEALTH & WELFARE BENEFITS-CLS	15,588.00	15,624.00		15,625.00	1.00-	100.01
3501	ST UNEMPLOYMENT INS-CERTIF	569.00	637.00		638.03	1.03-	100.16
3502	ST UNEMPLOYMENT INS-CLASSIFD	203.00	187.00		191.20	4.20-	102.25
3601	WORKER'S COMP-CERTIFICATED	34,132.00	38,204.00		38,394.86	190.86-	100.50
3602	WORKER'S COMP-CLASSIFIED	12,244.00	11,140.00		11,502.59	362.59-	103.25
	<b>Total Employee Benefits</b>	<b>879,368.00</b>	<b>849,009.00</b>	<b>.00</b>	<b>851,832.12</b>	<b>2,823.12-</b>	<b>100.33</b>
<b>Books and Supplies</b>							
4110	TEXTBOOKS	1,500.00	3,500.00		912.65	2,587.35	26.08
4310	MATERIALS & SUPPLIES	23,329.00	57,057.00		51,117.84	5,939.16	89.59
4351	OFFICE SUPPLIES	2,500.00	2,000.00		169.45	1,830.55	8.47
4374	CUSTODIAL SUPPLIES	5,000.00	7,000.00		7,869.29	869.29-	112.42
4396	FOOD SERVICE SUPPLIES	1,500.00	1,500.00		632.48	867.52	42.17
4400	EQUIPMENT	2,500.00	5,250.00		3,395.96	1,854.04	64.68
4710	FOOD	30,000.00	50,000.00		26,032.73	23,967.27	52.07
	<b>Total Books and Supplies</b>	<b>66,329.00</b>	<b>126,307.00</b>	<b>.00</b>	<b>90,130.40</b>	<b>36,176.60</b>	<b>71.36</b>
<b>Services and Other Operating Expenditures</b>							
5100	SUBAGREEMENTS FOR SERVICES		14,074.00		14,300.00	226.00-	101.61
5201	EMPLOYEE MILEAGE	2,200.00	2,300.00		2,780.42	480.42-	120.89
5210	TRAVEL & CONFERENCES	14,015.00	15,764.00		10,553.60	5,210.40	66.95
5300	DUES & MEMBERSHIPS	3,000.00	2,000.00		540.00	1,460.00	27.00
5450	OTHER INSURANCE	35,000.00	45,568.00		50,125.00	4,557.00-	110.00
5512	PROPANE	11,200.00	15,500.00		12,684.57	2,815.43	81.84
5520	ELECTRICITY SERVICES	14,000.00	14,000.00		15,916.92	1,916.92-	113.69
5530	WATER SERVICES	2,500.00	2,500.00		2,945.92	445.92-	117.84
5560	WASTE DISPOSAL	3,600.00	4,500.00		5,595.68	1,095.68-	124.35
5612	RENTALS AND LEASES-BUILDINGS	179,971.00	179,971.00		189,947.45	9,976.45-	105.54
5623	RENTALS AND LEASES-EQUIPMENT				803.00	803.00-	NO BDGT
5635	REPAIRS-EQUIPMENT	250.00	250.00			250.00	
5637	MAINTENANCE AGREEMENTS	11,440.00	13,600.00		11,316.82	2,283.18	83.21
5800	CONTRACTED SERVICES	87,802.00	96,245.00		88,894.80	7,350.20	92.36
5804	SECURITY SYSTEM	1,000.00	2,800.00		7,074.34	4,274.34-	252.66
5805	PRINTING SERV-OUTSIDE VENDOR	550.00	550.00			550.00	
5809	TRANSPORTATION-IN-LIEU PAYMT		359.00		359.00		100.00

Selection Grouped by Account Type - Sorted by Org, Fund, Object, Filtered by (Org = 2, Starting Period = 1, Ending Account Period = 0, Stmt Option? = , Zero Amounts? = N, SACS? = N, Restricted? = Y, Fund = 10)

Fund 10 - REDWOOD COAST MONTESSORI			Fiscal Year 2023/24 Through June 2024				
Object	Description	Adopted Budget	Revised Budget	Encumbrance	Actual	Balance	% Used
<b>Expenditure Detail (continued)</b>							
<b>Services and Other Operating Expenditures (continued)</b>							
5812	LIBRARY CONTRACT	3,400.00			400.00	400.00-	NO BDGT
5819	OTHER INTER-LEA CONTRACTS	109,363.00	109,363.00		122,519.00	13,156.00-	112.03
5823	LEGAL FEES	100.00	1,200.00		1,630.00	430.00-	135.83
5831	ADVERTISEMENT	250.00	1,000.00		1,260.00	260.00-	126.00
5852	PERSONAL SERVICE	10,000.00	45,000.00		37,156.87	7,843.13	82.57
5881	OTHER CHARGES/FEES	1,000.00	1,000.00		312.32	687.68	31.23
5884	LICENSE, PERMIT, USE FEE, TX	7,500.00	10,409.00		4,313.07	6,095.93	41.44
5888	OTHER OPERATING EXPENSE	23,373.00	100.00			100.00	
5909	TELEPHONE/COMMUNICATIONS	18,454.00	17,454.00		12,089.39	5,364.61	69.26
5950	POSTAGE	50.00	150.00		65.75	84.25	43.83
	<b>Total Services and Other Operating Expenditures</b>	<b>540,018.00</b>	<b>595,657.00</b>	<b>.00</b>	<b>593,583.92</b>	<b>2,073.08</b>	<b>99.65</b>
<b>Capital Outlay</b>							
6200	BLDGS & IMPROVEMENT OF BLDGS		100,000.00		91,252.00	8,748.00	91.25
	<b>Total Capital Outlay</b>	<b>.00</b>	<b>100,000.00</b>	<b>.00</b>	<b>91,252.00</b>	<b>8,748.00</b>	<b>91.25</b>
<b>Tuition</b>							
7142	OTH TUITN, EXCESS CSTS> COE	2,054.00	2,049.00		2,049.00		100.00
	<b>Total Tuition</b>	<b>2,054.00</b>	<b>2,049.00</b>	<b>.00</b>	<b>2,049.00</b>	<b>.00</b>	<b>100.00</b>
	<b>Total Year To Date Expenditures</b>	<b>3,041,634.00</b>	<b>3,317,855.00</b>	<b>.00</b>	<b>3,292,087.57</b>	<b>25,767.43</b>	<b>99.22</b>

Fund 10 - REDWOOD COAST MONTESSORI		Fiscal Year 2023/24 Through June 2024		
Object	Description	Beginning Balance	Year to Date Activity	Ending Balance
<b>Fund Reconciliation</b>				
<b>Assets</b>				
9110	CASH IN COUNTY TREASURY	717,267.37	175,201.29-	542,066.08
9111	FAIR VAL ADJ TO CASH IN TREAS	26,497.00-	15,149.00	11,348.00-
9200	ACCOUNTS RECEIVABLE		131,223.01	131,223.01
9201	ACCOUNTS RECEIVABLE-PRIOR YR	140,889.42	140,889.42-	
9330	PREPAID EXPENDITURES		33,494.53	33,494.53
	<b>Total Assets</b>	<b>831,659.79</b>	<b>136,224.17-</b>	<b>695,435.62</b>
<b>Liabilities</b>				
9500	ACCTS PAY (CURRENT LIABTY)		64,037.05	64,037.05
9510	ACCOUNTS PAYABLE-PRIOR YEAR	89,318.07	89,318.07-	
9537	EMPLOYER H&W SUSPENSE ACCNT	40,703.92	4,816.00	45,519.92
9591	DUE TO GOVERNMENTS PRIOR YR	4,265.92	4,265.92-	
9650	UNEARNED REVENUE	61,131.53	8,041.97-	53,089.56
	<b>Total Liabilities</b>	<b>195,419.44</b>	<b>32,772.91-</b>	<b>162,646.53</b>
	<b>Calculated Fund Balance</b>	<b>636,240.35</b>	<b>103,451.26-</b>	<b>532,789.09</b>
<b>Beginning Fund Balance</b>				
9791	BEGINNING BALANCE-ADPTD BDGT	636,240.35		636,240.35
9793	AUDIT ADJUSTMENTS		214.00-	214.00-
	<b>Total Beginning Fund Balance</b>	<b>636,240.35</b>	<b>214.00-</b>	<b>636,026.35</b>
	<b>Beginning Fund Balance Proof</b>	<b>.00</b>	<b>103,237.26-</b>	<b>103,237.26-</b>
<b>Change in Fund Balance - Excess Revenues ( Expenditures )</b>			<b>(103,237.26)</b>	

**Memo Only - Ending Fund Balance Accounts**

	Adopted	Revised
<b>Other Designations</b>		
9790 UNDESIGNATED/UNAPPROPRIATED	406,780.00	557,799.00

Fund 10 - REDWOOD COAST MONTESSORI			Fiscal Year 2023/24 Through June 2024			
Description	Adopted Budget	Revised Budget	Encumbrance	Actual	Budget Balance	% of Budget
<b>Revenues, Expenditures, and Changes in Fund Balance</b>						
A. Revenues	2,863,032.00	3,239,412.00		3,188,850.31	50,561.69	98.44
B. Expenditures	3,041,634.00	3,317,855.00		3,292,087.57	25,767.43	99.22
C. Subtotal (Revenue LESS Expense)	178,602.00-	78,443.00-		103,237.26-	24,794.26	
D. Other Financing Sources and Uses						
Sources						
LESS Uses						
E. Net Change in Fund Balance	178,602.00-	78,443.00-		103,237.26-	24,794.26	
F. Fund Balance:						
Beginning Balance (9791)	585,382.00	636,242.00		636,240.35		
Audit Adjustments (9793)				214.00-		
Other Restatements (9795)						
Adjusted Beginning Balance	585,382.00	636,242.00		636,026.35		
G. Calculated Ending Balance	406,780.00	557,799.00		532,789.09		
*Components of Ending Fund Balance						
Legally Restricted (9740)						
Other Designations (9780)						
Undesig/Unapprop (9790)	406,780.00	557,799.00				
Other						

# RCM School Board



Agenda Item: E2  
RCM Staff Stipend Policy

Department/Program:  
Business and Finance

## Background Information:

During the May 2024 regular meeting, the board discussed the importance of reviewing staff stipends with the goal of standardizing the approach and possibly increasing the stipend rate for clubs/classes/activities. Staff has drafted a proposed tool to use as part of a RCM stipend policy.

## Recommendation:

Hold discussion about stipend rates for RCM clubs/classes/activities and guidelines for future stipends. Provide guidance for any changes/additions to the draft stipend request document.

## Fiscal Implications:

Potential increase in expenditures, which will come from base LCFF funding.

## Contact Person:

Bryan Little



# RCM Stipend Request Form

*Stipend requests should be signed and submitted to the director after completion of the class.*

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Name of Class/Club/Activity:** \_\_\_\_\_

**Class Dates:** \_\_\_\_\_ - \_\_\_\_\_  
Begin Date End Date

**Total Class Hours:** \_\_\_\_\_ **Total Number of Students:** \_\_\_\_\_

## Student Roster

No.	Student Name	No.	Student Name
1		13	
2		14	
3		15	
4		16	
5		17	
6		18	
7		19	
8		20	
9		21	
10		22	
11		23	
12		24	

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## Additional Information

\_\_\_\_\_  
Administrative Signature

\_\_\_\_\_  
Date

# RCM School Board



Agenda Item: F1  
Williams Report

Department/Program:  
School wide

Background Information:

Beginning with the 2022-23 school year, RCM was placed on the Williams List. One of the requirements of the Williams legislation is that the Superintendent or designee conducts a visit to Redwood Coast Montessori and review curriculum, staffing, and facilities. This year, a Williams visit will take place on September 6, 2024. In addition, the County Office of Education must submit quarterly reports regarding any additional visits or actions.

Recommendation:  
No action required.

Fiscal Implications:  
None

Contact Person:  
Bryan Little

August 2, 2024

Redwood Coast Montessori  
PO Box 6103  
Eureka, CA 95501

Subject: 2024-2025 Williams Settlement School Site Visit

Dear Mr. Little,

This is to inform you that Redwood Coast Montessori's Manilla campus will receive a Williams Settlement site visit during the first four weeks of school with a proposed date of Friday, September 6, 2024. The Williams Settlement legislation requires the Humboldt County Office of Education (HCOE) to conduct site visits based on the Schools Identified for Monitoring list published by the California Department of Education.

Contact August Deshais, [adeshais@hcoe.org](mailto:adeshais@hcoe.org), (707) 440-9546, and/or Jennifer Burger, [jburger@hcoe.org](mailto:jburger@hcoe.org), (707) 445-7082, for questions regarding the Williams Settlement site visits.

Once complete, a written copy of our findings will be sent to the governing board of your charter. As required in Education Code 1240, the findings of all visits in the county will be forwarded to the Humboldt County Board of Education and the Humboldt County Board of Supervisors.

It is the intent of HCOE to collaboratively assist and support schools as we move through this process. Should you have questions or concerns, please feel free to contact me.

Sincerely,



Michael Davies-Hughes  
County Superintendent of Schools

Attachment: [Williams Pre-visit Checklist](#)



# RCM School Board



Agenda Item: F2  
WASC Visit

Department/Program:  
School wide

**Background Information:**

Redwood Coast Montessori is accredited through Accrediting Commission for Schools, Western Association of Schools and Colleges. In order to maintain our accreditation, a committee of WASC members schedule mid-cycle visit to schools to assure they are maintaining their high standards of education. During the 2024-25 school year a virtual “visit” will take place by a WASC director on April 21, 2025.

Recommendation:  
No action required.

Fiscal Implications:  
None

Contact Person:  
Bryan Little

# RCM School Board



Agenda Item: F3  
Board Training & Retreat Discussion.

Department/Program:  
School wide

Background Information:  
As outlined in the Redwood Coast Montessori WASC Action Plan, the RCM school board will meet on an annual basis to review the roles and responsibilities of the school board and to outline goals for the coming year. The Board approved at the June 2024 Regular meeting to meet on September 4<sup>th</sup>. Setting an agenda for the meeting will help it be productive and beneficial to the RCM community.

Recommendation:  
Discuss action plan as outlined during the Board Retreat

Fiscal Implications:  
None

Contact Person:  
Bryan Little

# RCM School Board



Agenda Item: F4  
Workplace Violence Prevention plan

Department/Program:  
School wide

## Background Information:

All employers are required to establish, implement, and maintain an effective, written Workplace Violence Prevention Plan (WVPP). This new rule is a result of California Senate Bill 553 (SB 553). Attached are an Employers Fact Sheet (ERs), an Employees Fact Sheet (EEs), and the initial ASD WVPP (created using the CAL OSHA Template). As part of SB 553, employees must have a way to report workplace violence and employers must maintain a log of these reported incidents. Compliance with SB 553 will be enforceable starting July 1, 2024, although the Occupational Safety and Health Standards Board (OSHSB) is not required to adopt a formal standard until December 31, 2026

## Recommendation:

Approve the Workplace Violence Protection Plan

## Fiscal Implications:

None

## Contact Person:

Bryan Little

## **WORKPLACE VIOLENCE PREVENTION PROGRAM for Redwood Coast Montessori (RCM)**

**Our establishment's Workplace Violence Prevention Plan (WVPP) addresses the hazards known to be associated with the four types of workplace violence as defined by [Labor Code \(LC\) section 6401.9](#).**

**Date of Last Review: 09/11/2024**

### **Definitions**

***Emergency*** - Unanticipated circumstances that can be life threatening or pose a risk of significant injuries to employees or other persons.

***Engineering controls*** - An aspect of the built space or a device that removes a hazard from the workplace or creates a barrier between the employee and the hazard.

***Log*** - The violent incident log required by LC section 6401.9.

***Plan*** - The workplace violence prevention plan required by LC section 6401.9.

***Serious injury or illness*** - Any injury or illness occurring in a place of employment or in connection with any employment that requires inpatient hospitalization for other than medical observation or diagnostic testing, or in which an employee suffers an amputation, the loss of an eye, or any serious degree of permanent disfigurement, but does not include any injury or illness or death caused by an accident on a public street or highway, unless the accident occurred in a construction zone.

***Threat of violence*** - Any verbal or written statement, including, but not limited to, texts, electronic messages, social media messages, or other online posts, or any behavioral or physical conduct, that conveys an intent, or that is reasonably perceived to convey an intent, to cause physical harm or to place someone in fear of physical harm, and that serves no legitimate purpose.

***Workplace violence*** - Any act of violence or threat of violence that occurs in a place of employment.

***Workplace violence*** includes, but is not limited to, the following:

- The threat or use of physical force against an employee that results in, or has a high likelihood of resulting in, injury, psychological trauma, or stress, regardless of whether the employee sustains an injury.
- An incident involving a threat or use of a firearm or other dangerous weapon, including the use of common objects as weapons, regardless of whether the employee sustains an injury.
- The following four workplace violence types:

***Type 1 violence*** - Workplace violence committed by a person who has no legitimate business at the worksite, and includes violent acts by anyone who enters the workplace or approaches employees with the intent to commit a crime.

***Type 2 violence*** - Workplace violence directed at employees by customers, clients, patients, students, inmates, or visitors.

***Type 3 violence*** - Workplace violence against an employee by a present or former employee, supervisor, or manager.

***Type 4 violence*** - Workplace violence committed in the workplace by a person who does not work there, but has or is known to have had a personal relationship with an employee.

***Workplace violence*** does not include lawful acts of self-defense or defense of others.

***Work practice controls*** - Procedures and rules which are used to effectively reduce workplace violence hazards.

### **Person(s) Responsible for Implementing the WVPP**

The ultimate responsibility for overseeing the development, implementation, and maintenance of the WVPP rests with the School Director.

The WVPP administrator, School Director, has the authority and responsibility to implement the provisions of this plan for Redwood Coast Montessori.

In addition, the Administrative Team (Director and Manila Site Supervisor) is responsible for hazard identification, safety inspections, coordinating emergency response to hazards, and maintenance of sites. Here is a list of current personnel in these positions, and contact information for each:

Responsible Person	Job Title/Position	WVPP Responsibilities	Phone #	Email
Bryan Little	Director	Overall responsibility, enforcement, and investigating claims.	707-630-5018	bryan@redwoodmontessori.org
Michelle Leonard	Manila Site Supervisor	Brings WVPP issues to Admin Team meetings, supports training, and employee involvement	707-832-4194	michelle@redwoodmontessori.org

All managers and supervisors are responsible for implementing and maintaining the WVPP in their work areas and for answering employee questions about the WVPP.

### **Procedures for Involving Employees in the Development and Implementation of the WVPP**

Involving employees in the development and implementation of our WVPP is a critical component to the program's overall effectiveness. We welcome and encourage employees to participate in both the initial development and implementation as well as the ongoing and annual updates of the plan. We will utilize the following procedures to involve employees in the development and implementation of this plan:

- As a step in the development and implementation of the WVPP, the DRAFT plan will be reviewed and discussed with the RCM Administrative Team at regularly scheduled meetings. The Admin Team will be asked to participate in the identification, evaluation and correcting of workplace violence, in designing and implementation of training, and in reporting and investigating workplace violence.
- Employee feedback and input will be solicited in faculty meetings on specific aspects around the development and implementation of the plan. The plan will be updated and sent out annually.
- Employees are also invited to submit their ideas directly to the Director via email, telephone, or an in-person meeting.
- Any additional feedback and suggestions are always welcome at staff meetings.

## **WVPP Implementation and Coordination**

It is critical to the implementation of this plan that Redwood Coast Montessori employees understand that we all have individual and collective responsibility for bringing any concerns forward in a timely and appropriate manner. In order to ensure we understand our roles, all aspects of the plan, and how to report incidents or concerns around workplace violence, Redwood Coast Montessori has established the following plan in place for implementation:

1. Redwood Coast Montessori will finalize the plan and provide annual training during back to school activities, and include this training in our series of mandated topics at the start of each school year.
2. Redwood Coast Montessori will work with CharterSafe to utilize online modules that are developed, and include quizzes either individually or group training sessions, with follow up questions and answer sessions to verify comprehension and ensure an interactive process.
3. Redwood Coast Montessori representatives will share WVPP meeting agendas and any pertinent information for changes or updates to the plan as determined by the WVPP committee.
4. As needed, communication will be sent out via email, newsletters, memos, or other means of communication, providing updates to all employees to support the development, implementation and /or updates of the plan, including timelines and next steps.

## **Procedures to Accept & Respond to Reports of Workplace Violence**

Any employee who observes an imminent threat or act of violence should call 911 and take steps to ensure their immediate personal safety. Redwood Coast Montessori, will follow its notification system, and shelter-in-place, lockdown and evacuation procedures as outlined in the RCM safety plan. Initial notification of potential or observed violence and necessary protective actions may be through public address system, intercom, cell phones, radio, walkie-talkie, etc. When safe to do so, employees should report concerns about workplace violence directly to the Director, who will adhere to the following process for accepting and responding to reports of workplace violence:

1. The reporting employee will be asked to complete a **WORKPLACE VIOLENCE REPORTING FORM**.
2. Once the report has been completed and received, the Director or their designee will take action in conducting an investigation into the threat, including gathering all relevant information, interviewing employees, visiting the location, documenting evidence, and asking follow-up questions.
3. After the investigation, findings will be determined and evaluated to identify the root cause.
4. Appropriate corrective actions will be taken to address the root cause, if necessary following disciplinary processes defined in collective bargaining agreements.
5. The Director will coordinate with the involved departments and staff to implement and ensure corrective actions.
6. The findings and corrective actions will be communicated back to the reporting employee.
7. The effectiveness of the corrective actions will be monitored by assigned supervisors.
8. The incident and all correlating information will be documented in the “Workplace Violence Log” for recordkeeping and reporting purposes. All employees are encouraged to report any concerns or incidents related to workplace violence, and that they can do so without fear of reprisal. Additional detailed procedural steps are outlined in the Employer’s Evaluation & Response section in detail.



### **Procedures to Ensure Compliance with the WVPP**

While the Director is responsible for overseeing the development, implementation, and maintenance of the WVPP, all employees are responsible for adhering to their roles, responsibilities, and training provided under this plan. Supervisors will use the following procedures to ensure employees comply with the WVPP:

- Ensure employees take/attend the initial and annual WVPP training(s) and refresher training(s).
- Work with personnel to incorporate WVPP training into onboarding of new employees.
- Monitor employee adherence to topics and concepts covered in the training they received.
- Follow our established disciplinary action process if an employee or supervisor does not follow elements of this plan.

### **Disciplinary Action**

Redwood Coast Montessori will actively support all aspects of the WVPP. An employee that fails to adhere to the established procedures and practices of the plan may be disciplined following Redwood Coast Montessori practice of progressive discipline including:

1. Retraining
2. Warning
3. Warning with reprimand placed in personnel file
4. Suspension from work with no compensation and record added to personnel file
5. Termination of employment, with a record added to the personnel file.

Whenever an employee is disciplined for non-compliance with the WVPP, their supervisor, Director or designee shall document the action taken.

## **Communication with Employees**

We recognize that open, two-way communication between our management team, staff, and other employers, about workplace violence issues is essential to a safe and productive workplace. The following communication system is designed to facilitate a continuous flow of workplace violence prevention information between management and staff in a form that is readily understandable by all employees, and consists of one or more of the following:

- New employee orientation includes workplace violence prevention policies and procedures.
- Workplace violence prevention training programs.
- Regularly scheduled meetings that address security issues and potential workplace violence hazards
- Effective communication between employees and supervisors about workplace violence prevention and violence concerns. RCM will communicate at monthly staff meetings, post monthly educational resources related to WPVP in the staff room, and the Remind App as needed.
  - RCM will ensure that supervisors and employees can communicate effectively and in the employees' first language.
- Posted or distributed workplace violence prevention information.
- How employees can report a violent incident, threat, or other workplace violence concern to employer or law enforcement without fear of reprisal or adverse action.
  - Multiple reporting avenues are readily available to encourage reporting. Including:
    - Reporting directly to a supervisor or administrator
    - Reporting anonymously through an online form
    - Reporting to a designated safety representative
    - Reporting directly to law enforcement in case of an immediate threat
- Employees will not be prevented from accessing their mobile or other communication devices to seek emergency assistance, assess the safety of a situation, or communicate with a person to verify their safety. Employees' concerns will be investigated in a timely manner and they will be informed of the results of the investigation and any corrective actions to be taken.
- Updates on the status of investigations and corrective actions are provided to employees through email and at safety meetings. These updates include information about the progress of investigations, the results of investigations, and any corrective actions taken.
- Updates during regularly scheduled safety team meetings to discuss the plan and any updates. These meetings could involve sharing updates to the plan, discussing recent incidents, and coordinating training sessions.

## **Workplace Violence Incident Reporting Procedure**

RCM will implement the following effective procedures to ensure that:

- All threats or acts of workplace violence are reported to an employee's supervisor or manager, who will inform the WVPP administrator. This will be accomplished by emailing the Executive Director or another administrator. If that's not possible, employees will report incidents directly to the WVPP administrator, Bryan Little, Director or Michelle Leonard, Manila Site Supervisor.
  - Employees can report incidents to their administrator or Director by email.
  - Submit a WVPP Form
  - Workplace Violence Reporting Form: Form can be found on the Redwood Coast Montessori website under Contact Us.

A strict non-retaliation policy is in place, and any instances of retaliation are dealt with swiftly and decisively. An employee who retaliates against a coworker for reporting an incident could be disciplined after a full investigation by site principals and administration. This will be in accordance with the employee handbook and collective bargaining agreement.

## **Emergency Response Procedures**

Redwood Coast Montessori has in place the following specific measures to handle actual or potential workplace violence emergencies:

- Effective means to alert employees of the presence, location, and nature of workplace violence emergencies by the following alarm protocols.
- Redwood Coast Montessori will have evacuation or sheltering in place plans. Employees will be told to "Lock Down" or "Evacuate" to the primary location or secondary locations depending on the information and directives of local law enforcement and/or school administration. School procedures and plans include maps of evacuation routes, locations of emergency exit, and instructions for sheltering in place and/or locking down or locking in campus. Evacuation maps are also located in the areas and displayed on the back of all doors.
- If there is immediate danger, call for emergency assistance by dialing 9-1-1 then notify a site administrator or the Executive Director.

**In the event of an emergency, including a Workplace Violence Emergency, contact the following:**

Workplace Violence Emergency – Report To			
Responsible Persons	Job Title	Phone #	Email
Bryan Little	Director	707-630-5018	bryan@redwoodmontessori.org
Michelle Leonard	Manila Site Supervisor	707-832-4194	michelle@redwoodmontessori.org
Workplace Hazards – Report To			
Bryan Little	Director	707-630-5018	bryan@redwoodmontessori.org
Michelle Leonard	Manila Site Supervisor	707-832-4194	michelle@redwoodmontessori.org

### **Workplace Violence Hazard Identification and Evaluation**

The following policies and procedures are established and required to be conducted by Redwood Coast Montessori to ensure that workplace violence hazards are identified and evaluated:

- Inspections shall be conducted:
  - When the plan is first established
  - Quarterly during the school year
  - After each workplace violence incident
  - Whenever the employer is made aware of a new or previously unrecognized hazard.
- Review all submitted/reported concerns of potential hazards:
  - Daily or weekly review of all submitted and reported concerns.
  - RCM Campus Hazards and Workplace Violence Drop Box
  - Workplace Violence Reporting Form emailed to Bryan Little, Director or Michelle Leonard, Manila Site Supervisor.

### **Employee and Supervisor Training**

Redwood Coast Montessori will provide employees and supervisors with initial training when the plan is first established and annually, or more frequently as needed, thereafter on all of the following:

1. Where to find a copy of the WVPP at no cost and how to participate in development and implementation of the employer’s plan.
2. The definitions and requirements of SB 553, which are included in the WVPP.
3. How to report workplace violence incidents or concerns to us and/or law enforcement, without fear of reprisal.
4. Workplace violence hazards specific to employees’ jobs, the corrective measures we have implemented, how to seek assistance to prevent or respond to violence, and strategies to avoid physical harm.
5. A Workplace Violence Log and how to obtain copies of records.
6. An opportunity for interactive questions and answers with a person knowledgeable about the employer’s plan.

Additional training shall be provided when a new or previously unrecognized workplace violence hazard has been identified and when changes are made to the plan. Additional training may be limited to addressing the new workplace violence hazard or changes to the plan.

Annual training will be provided to all employees through multiple channels including:

- Online courses through Charter Safe, with an interactive question and answer period.
- New employee training, as needed

### **Recordkeeping**

RCM will:

- Create and maintain records of workplace violence hazard identification, evaluation, and correction, for a minimum of five (5) years.
- Create and maintain training records for a minimum of one (1) year and include the following:
  - Training dates.
  - Contents or a summary of the training sessions.
  - Names and qualifications of persons conducting the training.
  - Names and job titles of all persons attending the training sessions.
- Maintain violent incident logs for minimum of five (5) years.
- Maintain records of workplace violence incident investigations for a minimum of five (5) years.
  - The records shall not contain medical information per subdivision (j) of section 56.05 of the Civil Code.
- All records of workplace violence hazard identification, evaluation, and correction; training, incident logs and workplace violence incident investigations required by LC section 6401.9(f), shall be made available to Cal/OSHA upon request for examination and copying.

### **Employee Access to Records**

The following records shall be made available to employees and their representatives, upon request and without cost, for examination and copying within 15 calendar days of a request:

- Records of workplace violence hazard identification, evaluation, and correction
- Training records
- Violent incident logs

The Director will be responsible for ensuring that all relevant records are completed, maintained, and made available upon request as required by this program and/or Cal/OSHA. A safe and healthy workplace is the goal of everyone at Redwood Coast Montessori with responsibility shared by management and staff alike.

## RCM Workplace Violence Reporting Form

THIS FORM IS TO BE USED BY EMPLOYEES THAT HAVE IDENTIFIED AN INCIDENT, THREAT OR CONCERN RELATED TO WORKPLACE VIOLENCE. THIS FORM BRINGS THE ISSUE TO THE ATTENTION OF THE MANAGEMENT.

IT IS ILLEGAL FOR THE EMPLOYER TO TAKE ACTION AGAINST AN EMPLOYEE FOR MAKING SUCH A REPORT. THE EMPLOYER MUST INVESTIGATE THE REPORT AND EXPLAIN TO EMPLOYEES THE ACTION TAKEN AND ANY SUBSEQUENT ACTIONS, AS NECESSARY.

To be completed by the individual investigating the incident. Return completed form within 2 days following incident to Bryan Little, Director or Michelle Leonard, Manila Site Supervisor

**Attach witness statements to this form.**

Report submitted by:	Date:
General Description:	Phone:

Date of Incident:	Time:
Address/Location of Incident:	

### Individuals involved in the incident (use additional sheet(s) if necessary)

Name:	Name:
<input type="checkbox"/> Victim or <input type="checkbox"/> Assailant	<input type="checkbox"/> Victim or <input type="checkbox"/> Assailant
Job Title:	Job Title:
Department:	Department:
Phone:	Phone:
Immediate Supervisor:	Immediate Supervisor:

### Classification of Incident (Select One)

<input type="checkbox"/> Type 1 Committed by a person who has no legitimate purpose at the worksite.	<input type="checkbox"/> Type 2 Committed by a person who does have a legitimate purpose at the worksite	<input type="checkbox"/> Type 3 Committed by a present or former employee, supervisor, or manager.	<input type="checkbox"/> Type 4 Committed by a person who does not work at the workplace, but has or is known to have had a relationship with an employee.
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**Classification of Incident Location (Select One)**

<input type="checkbox"/> At Workplace, Indoors (Please Include Bldg. Name/Room No.)	<input type="checkbox"/> At Workplace, Outdoors (Please Specify)	<input type="checkbox"/> Other Area (Please Explain)
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**Type of Incident**

<input type="checkbox"/> Physical Attack – no weapon/object
<input type="checkbox"/> Physical Attack – with weapon/object
<input type="checkbox"/> Threat of physical force and/or threat of use of a weapon/object
<input type="checkbox"/> Physical Assault - Hitting, fighting, pushing, or shoving
<input type="checkbox"/> Sexual assault/threat (incl. rape, attempted rape, physical display, or unwanted verbal/physical sexual contact)
<input type="checkbox"/> Other (specify)

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**How was the incident communicated? (Check one or more)**

<input type="checkbox"/> Communicated directly to victim	<input type="checkbox"/> Verbal	<input type="checkbox"/> Mail	<input type="checkbox"/> Note	<input type="checkbox"/> Email
<input type="checkbox"/> Communicated to another person	<input type="checkbox"/> Verbal	<input type="checkbox"/> Mail	<input type="checkbox"/> Note	<input type="checkbox"/> Email
<input type="checkbox"/> Other (specify)				

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**Initial Response or Follow up Activity: (Check all that apply)**

<input type="checkbox"/> Situation defused	<input type="checkbox"/> Occupational Medicine notified
<input type="checkbox"/> Security called	<input type="checkbox"/> Law Enforcement notified If Yes, Name of Agency and Report Number:
<input type="checkbox"/> First Aid Received?	<input type="checkbox"/> Employee Assistance Program Resources Provided?
<input type="checkbox"/> Other (specify)	

**Describe Incident in Detail**

*Include what happened, where, who was involved, what you heard, saw, etc. Also include the circumstances at time of incident (i.e.: was the employee completing usual job duties, was the area poorly lit, was the work being rushed, was the employee working during a low staffing level, was the employee isolated/alone, was the employee able to get help/assistance, was the employee working in a community setting, was the employee working in an unfamiliar/new location, other – please explain).*

**List Names of Other Witnesses**

Signature

Date

Person Receiving Witness Statement

Date





