

Heartwood Charter School

Agenda for the Meeting of the Heartwood Charter School Board of Directors

Location: 170 Liberty School Road, Petaluma, CA 94930

Call in location: 55 Fire Rd, Woodacre, CA 94973

The meeting may be joined by phone: [\(US\) +1 646-931-3860](tel:+16469313860) Passcode: 889874

Or by video conference

Join Zoom Meeting: <https://us06web.zoom.us/j/83744603777?pwd=cpN1qScoSDisvQAIRe3Zt9bXd79MVR.1&jst=2>

Tuesday February 24, 2026

9:30 AM Public Session

Call to Order

- I. Roll Call
- II. Regular Meeting
 - A. Agenda Adjustments and Approval
- III. Approval of Meeting Minutes
- IV. Correspondence
- V. Public Comment
- VI. Reports and Information
 - A. Director's Report
 1. Staffing
 2. Academics
 - B. Finance
 1. Budget Report
- VII. Action Items
 - A. The Board will consider the personnel actions and approve, defer or agree to study further.
 - B. The Board will consider enrollment limits for individual Bothin and Homeschool classes for the 2025-26 or 2026-27 school year, and approve, defer or agree to study further.
 - C. The Board will consider the Board Immigration Enforcement Activity Policy and Annual Notice, and approve, defer, or agree to study further.
 - D. The Board will consider the Heartwood Illness and Injury Prevention Program, and approve, defer, or agree to study further.
 - E. The Board will consider the Heartwood School Safety Plan, and approve, defer, or agree to study further.
 - F. The Board will consider the Heartwood Student Behavioral Health Referral Policy, and approve, defer, or agree to study further.
 - G. The Board will consider the 2nd Interim Budget report and approve, defer, or agree to study further.
 - H. The Board will consider the LCAP Midyear Report for 2025-26 and approve, defer or agree to study further.
 - I. The Board will consider the budget reallocations and approve, defer, or agree to study further.
- VIII. Consent Items
- IX. Board Discussion – this time is reserved for Board members to address colleagues and staff about matters they believe need study or action. The President will direct what action he or she feels should be taken on any item introduced by a Board member.
 - A. School initiatives for academic improvement
 - B. Renewal
- X. Closed Session

- A. Public Employee Performance Evaluation (Gov. Code section 54957(b)(1).)
- XI. Open Session
- XII. Action Taken in Closed Session
- XIII. Dates and Future Agenda Items conditions
- XIV. Adjourn

Heartwood Charter School Governing Board

Bothin Program Class Enrollment Limits 2025-26

1/27/2026 [Approved Class Limits](#)

2025-26 School Year

Class	Enrollment Status	Current
TK 1 (youngest)	Closed - Class not offered for 2025-26	0
TK 2	Open to capacity limit of 16	16
K	Open to capacity limit of 20	20
1	Open to capacity limit of 22	19
2	Limited to 1 new student (20) and then frozen	19
3	Open to capacity limit of 24	26
4	Open to capacity limit of 19	16
5	Open to capacity limit of 20	19
6	Frozen enrollment and currently closed	19
7	Open to capacity limit of 18	18
8	Frozen enrollment and currently closed	6

Open classes may have room for additional students up to the stated capacity limit. Individual classes may have different size limits. Once the limit is reached, the classes are closed. Student withdrawals may be filled up to the limit.

Closed classes are currently closed to new students, but withdrawals may be filled up to the stated limit.

Frozen enrollment classes are currently closed to new students and only currently enrolled students will be admitted. There is not a stated class size limit, and withdrawals will not be filled. Additional students may be admitted if recommended by Administration and approved by the Governing Board.

Limited classes are closed with a limited number of new students allowed. After the new student limit is reached, the class will be again closed and frozen. There is not a stated class size limit, and withdrawals will not be filled.

Heartwood Charter School Governing Board

Bothin Program Class Enrollment Limits 2026-27

12/09/2025 [Approved](#)

2026-27 School Year

Class	Enrollment Status	Possible Advancement
TK 1 (youngest)	Open to capacity of 10 (minimum 10)	--
TK 2	Open to capacity limit of 16	--
K	Open to capacity limit of 20	16
1	Open to capacity limit of 24	19
2	Open to capacity limit of 22	19
3	Frozen enrollment and currently closed	20
4	Frozen enrollment and currently closed	26
5	Open to capacity limit of 21	18
6	Open to capacity limit of 21	18
7	Frozen enrollment and currently closed	19
8	Frozen enrollment and currently closed	19

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HEARTWOOD

CHARTER SCHOOL

Re: Recent questions about immigration issues

Dear School Families:

First and foremost, providing a safe school environment for your children is our number one priority. Some families have expressed concern about recent news reports regarding immigration issues around the country and have asked how that might affect our school. While we can't affect national immigration policy, we can and do make sure your children are safe at all times while at school, and we will continue to do so. We want you to know that our school is a safe place, and we have protocols in place to ensure that no unauthorized visitors, including law enforcement, have unfettered access to our students.

Like all California public schools, we are obligated to enroll and serve students without regard to citizenship. We are dedicated to providing a safe and supportive environment for all students, regardless of immigration status. To that end, we protect information and documents concerning students' or their family members' citizenship or immigration status if we have any such information. Furthermore, we do not generally permit law enforcement, immigration or otherwise, from interviewing, detaining, searching, or otherwise accessing students, except in rare instances affecting the safety of our campus (e.g., an active shooter incident). Again, our school is a safe place for your child. Your child is much less likely to encounter law enforcement on our campus while in our care, than at a private workplace, at home, or elsewhere in the community. For this reason, we strongly encourage your child to continue attending school in person.

Although our campus is safe, you may encounter other concerns outside of school. In that regard, we urge families affected by changes in immigration policies to review the guidance and recommendations below, as well as the enclosed resources. We believe it would serve you well to establish a plan that our school can follow if you are detained for any reason, and unable to pick up or drop off your child. This will help enable us to continue supporting your child's education without interruption.

We encourage you to review this information as a family and reach out to us if you have any questions. Translation services are available upon request.

Make a Family Plan

Creating a Family Plan can help keep your family safe and prepared in case law enforcement visits your home and/or detains a parent or guardian. It will also guide us in supporting your child in the event of your detention.

- **Create a list of emergency contacts** for your family and share with the school. We will update your child's emergency card to ensure we can reach out and coordinate with the people you have selected regarding your child's safety and needs, including pick-up, drop-off, and access to school.

- **Prepare a childcare plan in advance**, which may include completing a Caregiver Authorization Affidavit. This simple form allows a non-parent relative to enroll your child in school, make school-related medical decisions, and handle other important matters on behalf of your child. Be sure to provide the completed form, including your designated caregiver's name and contact information, to the school. The form is available online at [California Courts - Caregiver Authorization Affidavit](#).

- **Keep a file of all important documents in a secure location** and ensure that your family members know where to find them. Important documents can include birth certificates, registry of birth (for U.S. born children registered in parent's home country), Social Security cards, driver license or other identification cards, marriage license, Caregiver's Affidavit, passports from your country of origin, your children's passport, etc.

- **Educate your children and family** about their rights if they are approached by law enforcement. The resources provided below contain information about rights.

- **Seek an advocate or other supports**
If you have immigration status concerns, **enclosed is a list of California - based immigrant rights organizations** accredited by the Board of Immigration Appeals (BIA) to represent immigrants before the Department of Homeland Security (DHS) and Executive Office of Immigration Review (EOIR).

Additional Resources

If a student's family member is detained, the ICE Detainee Locator can assist in identifying if the family member has been detained and where they are being held. When using the ICE Detainee Locator, it is helpful to have the family member's date of birth and their Alien Registration Number (A-Number), if available.

Access the ICE Detainee Locator here: [ICE Detainee Locator](#).

For immigrant rights information, please **see the resources here**: [National Immigrant Justice Center: Know Your Rights](#)

We understand that the laws in this area are evolving rapidly and may change in the coming weeks or months. We will continue to communicate with you and keep you informed of any updates to our guidance.

Please reach out to the school if you have any questions about the information above or the enclosed resources.

In partnership,

[Stephanie Felton-Priestner](#)

Executive Director

Enclosed:

- 1) U.S. Department of Justice List of Immigrant Rights Organizations Accredited Representatives
(CA)



POLICY REGARDING IMMIGRATION ENFORCEMENT ACTIVITY

I. PURPOSE AND COMMITMENT

Heartwood Charter School (“HCS” or the “Charter School”) fosters a safe, welcoming environment where all students, educators, and staff feel supported and connected. HCS supports all students’ right to education regardless of immigration status. State law requires that all public schools adopt policies in that regard.

HCS finds school facilities, official school activities (including those in public places), adjacent areas, and all property owned, controlled, or leased by HCS. HCS as “sensitive locations” under state law, and seeks commitments from contractors and service providers (particularly school resource officers) not to facilitate immigration enforcement at these locations unless law requires it.

HCS provides the Attorney General’s *Know Your Educational Rights* handout to all families upon enrollment. This handout is also posted in all administrative buildings on campus, and is available on the school website.

HCS also provides information about children’s educational rights as contained in this Policy, to all families upon enrollment and/or with the Student/Family Handbook.

All notices, enrollment materials, registration information, and complaint procedures are language-accessible pursuant to state and federal law.

II. DEFINITIONS

- *“Immigration enforcement”* includes any efforts to investigate, enforce, or assist in investigating or enforcing federal civil immigration law, and any efforts to investigate, enforce, or assist in investigating or enforcing federal criminal immigration law that penalizes a person’s presence in, entry, reentry to, or employment in the United States.
- *“Schoolsite”* means an individual school campus, a non-public area where we hold school-related activities, or school buses and other transportation we provide.

III. ANTI-DISCRIMINATION AND HARASSMENT

Heartwood Charter School

Board Policy Regarding Immigration Enforcement Activity

2/12/2026 **Proposed**

HCS prohibits discrimination, harassment, intimidation, and bullying based on protected characteristics including but not limited to, immigration status, nationality, race, ethnicity, citizenship status, color, religion, national origin, ancestry, or association with any protected group. This applies to schoolsites, at school-related events, and through school-owned technology.

HCS promptly and thoroughly investigates complaints of unlawful harassment or discrimination and takes appropriate corrective action when warranted. HCS educates students to respect all peers regardless of protected characteristics and teach them about bullying's negative impact.

HCS trains teachers, staff, and personnel to recognize their legal duty to eliminate hostile environments and respond to harassment incidents, and informs students who experience hate crimes of their right to report them.

HCS's Uniform Complaint Policy and Procedures and Harassment, Discrimination, Intimidation, & Bullying Policy are available for review upon request and/or on the school's website.

IV. STUDENT INFORMATION COLLECTION AND PROTECTION

General Principles

HCS does not request citizenship or immigration documents, information, or proof of citizenship or immigration status for enrollment, other than documents we might review but not retain to establish a child's birthdate. HCS does not collect information about students' or families' citizenship or immigration status except when state or federal law requires it to administer education programs. HCS does not:

- Allow school resources or data to create registries based on race, gender, sexual orientation, religion, ethnicity, or national origin
- Inquire about students' or parents' citizenship or immigration status
- Require documentation that may indicate immigration status (green cards, voter registration, passports, citizenship papers) to the exclusion of other permissible documents
- Use any information the school might possess about immigration status, citizenship status, or national origin to discriminate against students or families or bar children from enrollment

Enrollment Documentation

For Proof of Residency, HCS accepts:

- Property tax bills
- Rental contracts, leases, or payment receipts
- Utility service contracts, statements, or payment receipts
- Pay stubs
- Voter registration
- Correspondence from government agencies

Heartwood Charter School

Board Policy Regarding Immigration Enforcement Activity

2/12/2026 **Proposed**

- Declaration of residency executed by parent or legal guardian

For Age Verification, HCS accepts:

- Certified birth record
- Statement by local registrar or county recorder certifying date of birth
- Baptism certificate
- Passport
- When none are available, an affidavit from parent, guardian, or custodian, or other appropriate proof

In most cases, any one document from each category is sufficient. Age-verification documents (e.g. birth certificates or passports) that reveal immigration or citizenship status will be used only to verify age, and will not be retained in the student's education record.

Students experiencing homelessness may enroll even without typical documentation if otherwise eligible, consistent with the McKinney-Vento Homeless Assistance Act.

Special Program Information

When law requires national origin information for special programs (such as language instruction for English learners), HCS collects it separately from enrollment. HCS may ask for (but do not require) place of birth, U.S. entry date, and date first attending U.S. school. HCS does not use this information to discriminate or prevent enrollment if families choose not to provide it.

Social Security Information

HCS does not collect entire social security numbers or cards for enrollment. HCS may request the last four digits of an adult household member's Social Security number only to establish federal benefit program eligibility (such as free or reduced-price meals). When such information is requested, HCS explains this limited purpose and clarifies that not providing it does not bar enrollment.

For the Free and Reduced-Price Meals form, HCS notifies parents that:

1. If any household member participates in CalFresh, CalWORKs, or FDPIR, no adult needs to provide Social Security number information.
2. If no household member participates in these programs and no adult has a Social Security number, the student can still qualify based on income by checking the "No SSN" box

HCS treats all students equitably in receiving school services, including lunch programs, transportation, and educational instruction.

V. SHARING STUDENT INFORMATION

General Policy

Heartwood Charter School

Board Policy Regarding Immigration Enforcement Activity

2/12/2026 **Proposed**

HCS requires written parental consent (or consent from students aged 18+) before releasing personally identifiable student information, except when FERPA permits disclosure without consent (such as directory information or information relevant to legitimate educational interests).

HCS's requests for written consent include:

- Parent, guardian, or eligible student's signature and date
- Description of records disclosed
- Reason for release
- Parties receiving the information
- If requested, a copy of the records

Parents may choose to withhold such consent, in which case , HCS does not release it. HCS permanently keeps consent notices with record files.

HCS avoids disclosing information that might indicate a student's or family's citizenship or immigration status unless the Family Educational Rights and Privacy Act (FERPA), other federal or state law, or a valid court order, warrant, or subpoena authorizes it. HCS provides parent or guardian notification before responding to court orders, warrants, or subpoenas, except for child abuse/neglect investigations or when the subpoena, warrant, or order prohibits disclosure.

FERPA exceptions do not authorize disclosure for immigration enforcement purposes. Immigration enforcement does not serve a legitimate educational interest, and immigration status is not directory information.

Families can review our complete Education Records and Student Information Policy upon request and/or on the school website. HCS provides annual notice of this policy, including directory information and opt-out rights.

Immigration Enforcement Officers

Without a valid judicial warrant or subpoena, or court order, HCS does not disclose student education records or any personally identifiable information about students or their families—in any form—to immigration enforcement officers conducting an immigration enforcement action without written parental consent, including students' home address and travel schedules.

When a valid judicial warrant, subpoena, or court order requires disclosure, HCS notifies parents or guardians as soon as practicable.

Response to Information Requests

When HCS receives information requests related to immigration or citizenship status of a student, staff:

1. Notify a designated school official
2. Provide students and families appropriate notice and description of the request

3. Document verbal or written requests from immigration authorities
4. Unless prohibited, provide students and parents copies of documents issued by immigration enforcement officers

VI. CAMPUS ACCESS FOR IMMIGRATION ENFORCEMENT

Consistent with California law, HCS does not permit immigration enforcement officers to enter nonpublic areas of a schoolsite for immigration enforcement activity unless they present a valid judicial warrant or court order. If a law enforcement official presents such documentation, HCS requests they not interrupt students and faculty during class time and instead wait until a designated break period.

Response Procedures

Staff notify the schoolsite administrator or designee as soon as practicable about any immigration enforcement official request for student access, campus access, or document review.

Staff take these steps when an immigration or any other law enforcement official arrives at a schoolsite:

1. **Initial Contact:** Explain to the official that staff must first notify and receive direction from the site administrator
2. **Purpose:** Ask and document the official's stated reason for being at the schoolsite
3. **Documentation:** Request and copy the officer's credentials (name and badge number) and supervisor's phone number, and to produce documentation authorizing schoolsite access
4. **Record Keeping:** Make and retain copies of documentation the official produces
5. **Exigent Circumstances:** If the official declares exigent circumstances (such as a felony in progress on the schoolsite) and demands immediate access, comply with orders and immediately contact the site administrator
6. **Levels of Response:** If no exigent circumstances exist, respond according to the official's documentation:
 - o **ICE or other administrative warrant:** For warrants not signed by a judge, do not permit entry to nonpublic areas of the schoolsite. Refer to site administrator.
 - o **Judicial/court-issued warrant or court order:** Compliance is usually required to follow what is described in the court-issued order. When feasible, consult schoolsite administrator or legal counsel for next steps
 - o **Subpoena:** Physical access to the schoolsite is not required. Subpoenas seek documents. Inform the schoolsite administrator and await instructions. Do not permit entry to nonpublic areas
7. **Cooperation Without Consent:** While staff should not consent to access except as described above, they should not physically impede law enforcement officials, even if officials appear to exceed warrant authorization. Document law enforcement officials' actions if they enter without consent
8. **Parental Notification:** The schoolsite administrator may notify the student's parent or guardian's consent if a law enforcement official requests or gains access to a student for immigration enforcement, unless access is pursuant to a judicial warrant.

9. Required Notifications:

- The Executive Director or designee submits a timely report to the Board of Directors regarding immigration enforcement requests, actions, and HCS's responses, ensuring confidentiality of potentially identifying information
- The Executive Director or designee emails the Bureau of Children's Justice at BCJ@doj.ca.gov regarding any immigration enforcement official's attempt to access the school site or a student
- HCS follows its Comprehensive School Safety Plan procedures for notifying parents, guardians, students, teachers, administrators, and staff when HCS confirms immigration enforcement presence on campus

VIII. SUPPORT FOR AFFECTED FAMILIES

Emergency Preparedness

HCS encourages families to have emergency phone numbers and know where they keep important documentation (birth certificates, passports, Social Security cards, doctors' contacts, medication lists, allergy lists) to prepare for potential family member detention or deportation.

HCS permits and encourages students and families to update emergency contact information throughout the school year and provide alternative contacts when no parent or guardian is available. Families may include a trusted adult guardian as a secondary or tertiary emergency contact in case parents or guardians are detained. HCS uses emergency card information only for specified emergencies, not for other purposes.

Caregiver Authorization Affidavits

HCS encourages families to support relative caregivers in completing a Caregivers Authorization Affidavit. HCS will rely on a signed, completed Affidavit to allow an authorized caregiver to enroll a student in school and to consent to school-related medical care. A parent's signature is not required on the Caregiver Authorization Affidavit. This form is available [HERE](#).

When Parents Are Detained or Deported

If immigration authorities detain or deport a student's parent or guardian, HCS:

- Uses the student's emergency card contact information to release the student to designated emergency contacts
- Releases the student to an adult presenting a Caregiver's Authorization Affidavit on the student's behalf
- Contacts child protective services if the school cannot arrange timely care through emergency contacts, a Caregiver's Authorization Affidavit, or other parent-provided information or instructions

Family Safety Plans

Heartwood Charter School

Board Policy Regarding Immigration Enforcement Activity

2/12/2026 **Proposed**

HCS encourages families to develop Family Safety Plans to store at known locations. These plans identify trusted adults who can care for students if parents or guardians cannot. Students should know who their trusted adult is, that this person is their contact if parents are detained or deported, and how to reach them.

Additional Resources

When a family member is detained, HCS may refer students and families to:

ICE Detainee Locator (<https://locator.ice.gov/odls#/search>)

- Helps determine if and where family members are detained
- Requires date of birth and Alien Registration Number (A-Number) if available
- **Note:** Use this only to locate detained individuals. HCS never refers students, parents, or guardians to ICE or immigration enforcement for general immigration status questions

Legal Assistance

- Legal aid organizations may secure detained parents' release or arrange student visits
- California organizations accredited by the Board of Immigration Appeals:
<https://www.justice.gov/eoir/recognition-accreditation-roster-reports>
- California court Self-Help Centers for family law assistance:
<http://www.courts.ca.gov/selfhelp-selfhelpcenters.htm>
- Legal aid offices and lawyer referral services: <http://www.courts.ca.gov/1001.htm>

Consulates or Embassies

- The parent's or guardian's country of origin may offer additional information and assistance.



POLICY ADDRESSING STUDENT BEHAVIORAL HEALTH REFERRAL PROTOCOLS

The Board of Directors of Heartwood Charter School (“HCS” or “Charter School”) adopts the following policy on referral protocols for addressing student behavioral health concerns in grades 7–12. This policy has been developed in consultation with school and community stakeholders and school-linked behavioral health professionals and establishes the adopted procedures relating to referrals to behavioral health professionals and support services.

HCS will comply with all state and federal student data and privacy requirements, including but not limited to the Family Educational Rights and Privacy Act (“FERPA”) in the administration of this Policy.

Whenever possible and practicable, the protocols and procedures below will be used in lieu of disciplinary actions, and students who may be subject to disciplinary action will be able to access them and will not be prohibited from doing so.

All protocols will reflect evidence-based and culturally appropriate approaches to student behavioral health referrals.

Addressing the Needs of High-Risk Groups

HCS recognizes the importance of ensuring equitable access to behavioral health supports for **all** students, including the unique needs of high-risk student groups, which include but are not limited to the following:

- Students with disabilities, mental illness, or substance use disorders, foster youth, and youth placed in out-of-home settings.
- Homeless youth.
- Students experiencing bereavement or loss of a close family member or friend.
- Students for whom there is a concern due to behavioral health disorders, including common psychiatric conditions and substance use disorders such as opioid and alcohol abuse.
- Lesbian, gay, bisexual, transgender, or questioning students.

HCS staff who oversee the mental and behavioral health needs of students are responsible for coordinating implementation of these group-specific referral protocols, in collaboration with the Director of Special Education (IEP/504), Foster Youth Liaison, Homeless Liaison, and HCS administrators.

HCS may also identify additional student groups, such as English learners or recently immigrated students, if local data or partner input show increased behavioral health risks.

Referral Protocols and Procedures

1. Needs Assessment

The Executive Director or designee shall conduct an annual needs assessment to:

- Identify behavioral health trends;
- Review available resources; and
- Detect service gaps within the school community.

HCS shall review referral volume, response times, and outcomes on a quarterly basis for continuous improvement.

2. Capacity Building

HCS shall:

- Provide professional development on referral pathways and staff roles;
- Clarify responsibilities among certificated and classified staff; and
- Maintain partnerships with school-linked behavioral health professionals and community providers

3. Planning

The Executive Director or designee shall:

- Define referral pathways for crisis and non-crisis concerns;
- Establish goals and assign responsible roles for each step in the referral process; and
- Enter into memoranda of understanding with external partners, where appropriate, to support referral handoffs and information-sharing.

4. Implementation

HCS shall establish step-by-step procedures to:

- Initiate referrals;
- Document concerns;
- Notify parents/guardians consistent with law;
- Triage level of need;
- Link students to appropriate services; and
- Schedule follow-up checks.

5. Evaluation and Continuous Improvement

HCS shall conduct an annual evaluation of referral protocols that includes:

- Data collection and analysis;
- Input from staff, families, and community stakeholders; and
- Targeted improvements based on results.

Evaluation monitors outcomes such as:

- Median time to first contact;

Heartwood Charter School

Board Policy for Student Behavioral Health Referral

2/12/2026 **Proposed**

- Percentage of follow-ups completed within ten school days;
- Referral closure rates; and
- Results for the student groups identified in EC Section 49428.2(b)(3).

A summary of results is reported to the HCS Board annually to support transparency and continuous improvement.

Staff Training

HCS shall ensure that teachers of students in grades 7–12 receive training at least once on student behavioral health. Training shall include the following:

1. Instruction around the unique risk factors and warning signs of behavioral health problems in adolescents,
2. Understanding the importance of early intervention,
3. How to help an adolescent in crisis or experiencing a behavioral health challenge, including guidance on when to make referrals consistent with this Policy
4. Instruction on recognizing the signs and symptoms of youth behavioral health disorders, including, but not limited to, psychiatric conditions and substance use disorders such as opioid and alcohol abuse.
5. Instruction on how to maintain student privacy and confidentiality in a manner consistent with federal and state privacy laws.
6. Instruction on the safe deescalation of crisis situations involving students with a youth behavioral health disorder.

Training materials approved by HCS shall include:

- How to identify appropriate contacts for behavioral health evaluation, services, or both evaluation and services, at both HCS and within the larger community; and
- When and how to refer students and their families to those services.
- Recognizing the signs and symptoms of youth behavioral health disorders.

Authorization and Scope of Practice

In order to ensure that all school employees act only within the authorization or scope of their credential or license, HCS shall:

- Provide training and guidance to staff clarifying their roles in the referral process and the limits of their credential or license.
- Direct employees to refer students to appropriately credentialed or licensed professionals when behavioral health concerns are identified.
- Maintain referral protocols that specify which staff positions are authorized to act at each stage of the referral process.
- Review job descriptions and assignments to confirm they align with credentialing and licensing requirements.
- Inform staff clearly that only licensed or credentialed professionals are permitted to diagnose or treat behavioral health conditions.

No school staff will diagnose or treat youth behavioral health disorders unless they are specifically licensed and employed to do so.



HEARTWOOD

CHARTER SCHOOL

HEARTWOOD CHARTER SCHOOL TK-12 School Safety Plan 2025 Version

Heartwood Charter School
Homeschool Program
170 Liberty School Rd.
Petaluma, CA
Phone: 1 (707) 200-7812

&

Bothin Waldorf Program
3125 Sir Francis Drake Blvd
Fairfax, CA
1 (415) 328-1020

Heartwood Charter School
School Safety Plan
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I. The School Safety Plan Overview

This School Safety Plan has been prepared to fulfill the obligation of Heartwood Charter School as set forth in its charter petition, pursuant to Education Code section 47605(c)(5)(F), to develop a school safety plan addressing the safety topics listed in subparagraphs (A) to (L) of paragraph (2) of subdivision (a) of Education Code section 32282, as applicable. It will be reviewed and updated annually by March 1 by the Administrative Team.

- Development of this version of the School Safety Plan took place in December 2024
- A hearing was held on the School Safety Plan on the 29th day of January, 2025 at the Liberty Elementary School District office in Petaluma, CA
- The most current copy of the plan will be available in the school office for public review in a redacted form, with all tactical responses, lockdown, and bomb threat procedures removed from the publicly available version.

For additional information on school safety programs, policies, or procedures and how you may become involved locally, please contact:

[Tamara Lemesh], [Vice Principal]
[707-347-9584]
[tamara.l@heartwoodcharterschool.org]
[3125 Sir Francis Drake Blvd.
Fairfax, CA 9

Reviewed and approved by the undersigned members of the Heartwood Charter School Safety Committee:

Authorized Representative Signature	Date
Tamara Lemesh, Vice Principal	
Stephanie Felton-Priestner, Executive Director	
Mark Puccinelli , Board President	
[Name], [Title]	

II. General School Information

School Profile

2023-24 enrollment: 576

Grades: TK-12

Certificated teachers (Admin included): 32

Classified staff: 7

Safe School Mission

Students and staff will have a safe and secure campus where they are free from physical and psychological harm. The administration and staff are committed to maximizing school safety and to creating a positive learning environment that teaches strategies for violence prevention and emphasizes high expectations for student conduct, responsible behavior, and respect for others.

School Crime Status:

To ensure an accurate and up-to-date picture of campus safety, Heartwood Charter School shall annually review disciplinary and crime-related data and adapt as necessary to changing trends. To keep ahead of trends in crime and safety affecting the school, the following types of data shall be reviewed each year, only for the Bothin site-based campus:

Office Referrals

Heartwood Charter School's safety-related office referrals for the previous school year are included here for reference.

Fighting or aggression	2
Theft	0
Cheating/Academic Integrity	2
Disruption or defiance	0
Others	0

Attendance Rate

School Year	Attendance Rate
2023-2024	92

Suspension/Expulsion data

School Year	Suspension rate	Expulsion rate
2023-2024	Less than 1%	Less than 1%

III. Emergency Response Plan

Emergency Situation Parent Communication

In an emergency situation, Executive Director will gather members of the Safety Response Team immediately to draft a plan to communicate with families. When deemed necessary, the Safety Response Team will use Parent Square and Sendpulse SMS, to send out an urgent email alert text message and phone call to every parent registered on the platform.

Emergency Supplies

Emergency Backpack Location

- Each classroom (including orchestra room, Hearth, intervention rooms, etc.)
- Lyman Hall- Resource Room
- Dining Hall- Music Room
- Hearth

Emergency Backpack Supplies

Item	Recommended Quantity
Backpack	1
Flashlight	1
Batteries	2
Pair of scissors	1
First Aid instruction summary sheet	1
Pad of paper (for name tags, etc.)	1
Pen	1
Pencil	1
Light stick	1
Whistle	1
Sewing kit	1
Package of safety pins	1 package
Package of plastic trash bags	6 packages

Package of small paper bags	2 packages
Package of paper cups	2 packages
Package of pre-moistened towelettes	1 package
Bottle of hydrogen peroxide	1
Small package of Tylenol	2 packages
Package of Tums	1 package
Ammonia inhalants	4
Ziploc sandwich bags	2
Box of Telfa pads	1
Box of Band-Aids	1
Cold packs	2
Roll of adhesive tape	1
Pair of disposable gloves	10
Box of toilet tissue	1

Emergency Response Plans

The safety coordinator (or Office Manager if none is designated otherwise) is responsible for assigning staff to the safety response team, and for ensuring that the list is updated regularly. It is required by fire codes to exhibit an evacuation map specific to the school site in each and every classroom and office room by the door, as well as by each fire extinguisher and fire exits.

Please note: make sure to share the procedures with and collect contact information for any after-school staff. Please instruct any night custodial staff to assist after-school staff with emergency supplies as needed.

Fire Emergency

Fire Emergency Response - Staff Members and Safety Response Team Combined	
Step 1 Fire Alarm	● If there is a fire and the alarm has not been set off, any member witnessing the fire may initiate the fire alarm.
Step 2 Announcement	● Safety Response Team Member will announce via phone speaker and walkie talkie <i>"Attention please, leave the building. Evacuate the building. Leave the building. Evacuate the building and listen for further instructions."</i>
Step 3 Walkie Talkie and	● If walkie talkies are not already on, turn on walkie talkies to Channel 10. Classroom teachers to take Emergency Backpack and Emergency Contact

backpacks	Roster
Step 4 Evacuate	<ul style="list-style-type: none"> ● Staff and students will evacuate the building in a quiet and orderly fashion using emergency exit routes. We will meet at the Emergency Meeting Area: <ul style="list-style-type: none"> ○ [Flag pole near Manor for Bay Tree, Little House, Stone House, Lyman and Manor classes. Students in the Red Barn, Dining Hall and Bush Unit will meet on the parking lot near the Dining Hall.] ● Safety Response Team will ensure all classrooms, hallways, cafeteria, kitchen, restrooms and offices are empty. Safety Response Team will search for any missing students and staff.
Step 5 Take roll	<ul style="list-style-type: none"> ● Once you arrive at the Emergency Meeting Area, take roll, and notify the Safety Response Team of any missing students. ● Stay in meeting area for further instruction.
Step 6 Further instructions & Return	<ul style="list-style-type: none"> ● Await further instructions from the Fire Department

Earthquake Emergency

Earthquake Emergency Response - Staff Members and Safety Response Team Combined	
Step 1 Announcement	<ul style="list-style-type: none"> ● At the onset of an earthquake, Safety Response Team Member will announce via phone speaker and walkie talkie: <i>"Earthquake. Duck and cover. Earthquake. Duck and cover. Earthquake. Duck and cover."</i>
Step 2 Immediate response	<p>If indoors...</p> <ul style="list-style-type: none"> ● Turn away from windows, suspended objects or outside walls ● Drop to the floor, take cover under a desk, table or against an interior wall. ● Make your body as small as possible; cover head and neck while protecting chest. ● Hold position until the ground stops shaking or the Safety Response Team has announced over radios to begin Evacuation. ● If an aftershock occurs while you are exiting the building, "Drop, Cover and Hold On" until the shaking stops. <p>If outdoors...</p> <ul style="list-style-type: none"> ● Teachers get to a clear space (away from buildings, poles, overhead wires and other tall objects) call out to student, "Duck and cover" ● Students drop to the ground and cover their head and neck with arms. ● Watch for dangers that may demand movement. ● Be prepared to duck and cover again due to aftershocks. ● Hold position until the ground stops shaking or the Safety Response Team has announced over radios to begin Evacuation.
Step 3 Walkie Talkie and backpacks	<ul style="list-style-type: none"> ● If walkie talkies are not already on, turn on walkie talkies to Channel 10. Classroom teachers to take Emergency Backpack and Emergency Contact Roster
Step 4 Evacuate	<ul style="list-style-type: none"> ● Staff and students will evacuate the building in a quiet and orderly fashion using emergency exit routes. We will meet at the Emergency Meeting Area: <ul style="list-style-type: none"> ○ [Flag pole near Manor for Bay Tree, Little House, Stone House, Lyman and Manor classes. Students in the Red Barn, Dining Hall and Bush Unit will meet on the parking lot near the Dining Hall.] ● Safety Response Team will ensure all classrooms, hallways, cafeteria, kitchen, restrooms and offices are empty. Safety Response Team will search for any missing students and staff.
Step 5 Take roll	<ul style="list-style-type: none"> ● Once you arrive at the Emergency Meeting Area, take roll, and notify the Safety Response Team of any missing students. ● Stay in the meeting area for further instruction.

Step 6 Further instructions & Return	<p>If there is minimal damage:</p> <ul style="list-style-type: none"> ● Safety Response Team will announce <i>"All Clear. All Clear. Please return to your normal activity."</i> ● Staff and students will return to classrooms in a quiet and orderly fashion. <p>If there is damage to the campus:</p> <ul style="list-style-type: none"> ● Safety Response Team will enact the Reunification Plan at the site of evacuation, or where a Law Enforcement Agency indicates.
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Active Shooter or Intruder Emergency

Active Shooter Emergency Response - For Staff Members	
Step 1 Announcement	<ul style="list-style-type: none"> ● If an active shooter is identified, immediate announcements will be heard via PA system, phone speaker, walkie talkies <i>"Lockdown. This is a lockdown. Lockdown. All students and staff lockdown."</i>
Step 2 Enter a lockdown location	<ul style="list-style-type: none"> ● In the case of a shooting or suspected intruder, the first priority is to shelter students and staff. If you are... <ul style="list-style-type: none"> ○ Outside of your classroom: bring students into the nearest classroom ○ In the cafeteria: move to the nearest classroom. ○ In the hallway: proceed to the nearest classroom, even if it is not your classroom and a class is already in there. ● Classroom teachers should quickly glance outside the room and direct any students or staff into your room.
Step 3 Prepare the classroom	<ul style="list-style-type: none"> ● Classroom teachers should immediately take walkie talkies and turn them on and on Channel 10. Please keep the volume as low as possible. ● Close and lock doors. ● Close and lock windows and shut the blinds. ● Turn off all the lights. ● Keep the room quiet.
Step 4 Hide	<ul style="list-style-type: none"> ● Direct students to hide in the classroom. Determine whether ducking quietly under their desks ("duck and cover") or sitting along a wall or in a closet is the best location to hide. ● Move away from windows, try not to be visible from outside.
Step 5 Take roll	<ul style="list-style-type: none"> ● Take roll as quietly as possible. ● Talk through walkie talkie at very low volume to alert the Safety Response Team if you have students missing from your classroom.
Step 6 Release the room	<ul style="list-style-type: none"> ● All three credentials must be satisfied before unlocking the door from the inside. <ul style="list-style-type: none"> ○ Credential 1: Door communication Safety Response Team will knock on the door with a pre-set pattern (i.e. "Knock-, knock-, knock knock knock") ○ Credentials 2: Walkie Talkie communication Safety Response Team contact each specific classroom via walkie talkie notification ("Room 1, This is [John Doe], all clear to unlock the door.") ○ Credential 3: Paper communication <ul style="list-style-type: none"> ■ Safety Response Team will slide a BLUE sheet of paper under the door from outside the classroom to the inside. ■ Staff inside the classroom will have to slide a RED piece of paper under the door to the outside of the classroom in response as the confirmation of receiving the true release order. Do not slide the paper back if the intruder is inside the room. The red paper is usually by the door.

	<ul style="list-style-type: none"> ● When all three credentials are cleared, you will hear the safety response team member say “Thank you, you can safely unlock your room”. You can open the door then.
Step 7 School-wide clearance	<ul style="list-style-type: none"> ● Please ask students to stay in hiding positions and stay quiet until all classrooms are cleared, when you hear the announcement via PA system, phone speaker, walkie talkies: <i>“The school is all cleared. You can return to normal activities.”</i>
Step 8 (In real situation only) Evacuation & Reunification	<ul style="list-style-type: none"> ● In a real active shooting situation, the police or safety response team may make an evacuation announcement. If so, evacuate to the evacuation point. ● In some situations, the police or safety response team may initiate a reunification process for students to reunite with their families.

Active Shooter Emergency Response - For Safety Response Team in drill	
Step 1 Announcement	<ul style="list-style-type: none"> ● If an active shooter is identified, immediate announcements will be heard via PA system, phone speaker, walkie talkies <i>“Lockdown drill. This is a lockdown drill. Lockdown drill. All students and staff lockdown.”</i>
Step 2 Safety Team Search	<ul style="list-style-type: none"> ● Sweep and locate all missing students. ● Check whether windows are locked from outside, blinds are shut, doors locked, lights off, and students are quiet.
Step 3 Release the room	<ul style="list-style-type: none"> ● All three credentials must be satisfied before unlocking the door from the inside. <ul style="list-style-type: none"> ○ Credential 1: Door communication Safety Response Team will knock on the door with a pre-set pattern (i.e. “Knock-, knock-, knock knock knock”) ○ Credentials 2: Walkie Talkie communication Safety Response Team contact each specific classroom via walkie talkie notification (“Room 1, This is [John Doe], all clear to unlock the door.”) ○ Credential 3: Paper communication <ul style="list-style-type: none"> ■ Safety Response Team will slide a BLUE sheet of paper under the door from outside the classroom to the inside. ■ Staff inside the classroom will have to slide a RED sheet of paper under the door to the outside of the classroom in response as the confirmation of receiving the true release order. Do not slide the paper back if the intruder is inside the room. The red paper is usually by the door. ● When all three credentials are cleared, say “Thank you, you can safely unlock your room”. ● When teachers open the room, return the PURPLE sheet and retrieve the BLUE sheet. Ask teachers and students to stay quiet until all rooms are cleared.
Step 7 School-wide clearance	<ul style="list-style-type: none"> ● When all classrooms are cleared, make the announcement via PA system, phone speaker, walkie talkies and WeChat group chat: <i>“The school is all cleared. You can return to normal activities.”</i>

Active Shooter Emergency Response - For Safety Response Team in a real active shooting	
Step 1 Announcement	<ul style="list-style-type: none"> ● If an active shooter is identified, immediate announcements will be heard via PA system, phone speaker, walkie talkies]: <i>“Lockdown. This is a lockdown. Lockdown. All students and staff lockdown.”</i>
Step 2 Call 911	<ul style="list-style-type: none"> ● Administrative staff to call 911 immediately and inform the operator that there is an active shooter or intruder in or around the school.
Step 3 Shelter	<ul style="list-style-type: none"> ● In the case of a shooting or suspected intruder, the first priority is to shelter students and staff. Get into the nearest room to hide and shelter. ● Check common areas for students and guide them to a lockdown location ONLY IF the condition is evaluated to be safe enough to do so.

	<ul style="list-style-type: none"> ● Take walkie talkies and turn them on and on Channel 1. Please keep the volume as low as possible. ● Close and lock doors. Close and lock windows and shut the blinds. Turn off lights. Keep quiet. ● Hide in the room and stay invisible from outside.
Step 4 Follow Police Instruction	<ul style="list-style-type: none"> ● Follow the instruction when police arrives (such as release classrooms, evacuate, initiate reunification, inform families, clear all school, etc.)

Bomb Emergency

Bomb Threat (By Phone) Emergency Response	
Step 1 Answer the call	<ul style="list-style-type: none"> ● Notify Administrative Staff immediately <ul style="list-style-type: none"> ○ [[Tamara Lemesh @ 707-695-1184 and Stephanie Felton Priestner @415-488-9572] ● Try to maintain the caller on the line and obtain information from the caller such as where the bomb is, where it is set to explode, what it looks like, what kind of bomb it is, why it is there and who the caller is. Note any identifying features about the caller (i.e. gender, speech patterns, background noise, identifying location).
Step 2 Call 911	<ul style="list-style-type: none"> ● Administrative staff to call 911 immediately and inform the operator that there is a current bomb threat on another phone line and provide the number of the line.
Step 3 Team Touchbase	<ul style="list-style-type: none"> ● Immediately gather the Safety Response Team ● Make quick discussion based on the information from the call and decide <ul style="list-style-type: none"> ○ Whether the students should duck and cover ○ How to evacuate students in the area where the bomb is claimed to be at ○ Whether we should evacuate all students ○ Other response plan impacted by the bomb threat information
Step 4 Announcement	<ul style="list-style-type: none"> ● Safety Response Team staff will make announcements as soon as possible over the phone speaker, with the signal <ul style="list-style-type: none"> ○ If duck and cover: <i>"Emergency. Duck and Cover. Emergency. Duck and Cover."</i> ○ If evacuated: <i>"Emergency. Leave the building. Evacuate the building. Emergency. Leave the building. Evacuate the building."</i> ○ If other instructions are more appropriate, make announcements accordingly.
Step 5 Cover/Evacuate	<ul style="list-style-type: none"> ● If walkie talkies are not already on, turn on walkie talkies to Channel 10. Classroom teachers to take Emergency Backpack and Emergency Contact Roster ● Use radios, two-way radios and phones only if absolutely necessary as the frequencies may set off the bomb(s). ● Based on the announcement, duck and cover or evacuate using same order and routes as fire/earthquake
Step 6 Take roll	<ul style="list-style-type: none"> ● Take roll and notify the Safety Response Team of any missing students. ● Stay for further instruction.
Step 6 Safety Team Search	<ul style="list-style-type: none"> ● Before emergency crews are on campus, do not search for any bomb, or explosive. ● Search only for people who should be evacuated.
Step 8 Further instructions & Return	<ul style="list-style-type: none"> ● Do not resume school activities until the Safety Response Team announces <i>"All Clear. All Clear. Please return to your normal activity."</i>

	<ul style="list-style-type: none"> ● If deemed necessary, the Safety Response Team will enact the Reunification Plan at the site of evacuation, or where a Law Enforcement Agency indicates.
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Bomb Threat (By Suspicious Object) Emergency Response	
Step 1 Discover the object	<ul style="list-style-type: none"> ● Notify Administrative Staff immediately <ul style="list-style-type: none"> ○ [Tamara Lemesh @ 707-695-1184 and Stephanie Felton Priestner @415-488-9572] ● Do not touch the object but note any identifying features to describe it to the Safety Response Team and Emergency crews (Fire Department or Police Department) ● Keep students away from the vicinity of the suspicious object
Step 2 Call 911	<ul style="list-style-type: none"> ● Administrative staff to call 911 immediately and inform the operator that there is a current bomb threat on another phone line and provide the number of the line.
Step 3 Team Touchbase	<ul style="list-style-type: none"> ● Immediately gather the Safety Response Team ● Have a quick discussion based on the information from the call and decide <ul style="list-style-type: none"> ○ Whether the students should duck and cover ○ How to evacuate students in the area where the bomb is claimed to be at ○ Whether we should evacuate all students ○ Other response plan impacted by the bomb threat information
Step 4 Announcement	<ul style="list-style-type: none"> ● Safety Response Team staff will make announcements as soon as possible over the phone speaker, with the signal <ul style="list-style-type: none"> ○ If duck and cover: <i>"Emergency. Duck and Cover. Emergency. Duck and Cover."</i> ○ If evacuated: <i>"Emergency. Leave the building. Evacuate the building. Emergency. Leave the building. Evacuate the building."</i> ○ If other instructions are more appropriate, announce accordingly.
Step 5 Cover/Evacuate	<ul style="list-style-type: none"> ● If walkie talkies are not already on, turn on walkie talkies to Channel 10. Classroom teachers to take Emergency Backpack and Emergency Contact Roster ● Use radios, two-way radios and phones only if absolutely necessary as the frequencies may set off the bomb(s). ● Based on the announcement, duck and cover or evacuate using same order and routes as fire/earthquake
Step 6 Take roll	<ul style="list-style-type: none"> ● Take roll and notify the Safety Response Team of any missing students. ● Stay for further instruction.
Step 7 Safety team search	<ul style="list-style-type: none"> ● Before emergency crews are on campus, do not search for any bomb, or explosive. ● Search only for people who should be evacuated.
Step 8 Further instructions & Return	<ul style="list-style-type: none"> ● Do not resume school activities until the Safety Response Team announces <i>"All Clear. All Clear. Please return to your normal activity."</i> ● If deemed necessary, the Safety Response Team will enact the Reunification Plan at the site of evacuation, or where a Law Enforcement Agency indicates.

Other Emergency Situations

Flood/Severe Weather

Warnings of severe weather are usually received via public radio or the State Warning Center. If time and conditions permit, students may be sent home. However, if the

weather conditions develop during school hours, without sufficient warning, students should be held at school.

1. Executive Director will assess the situation.
2. Safety Response Team will make an announcement over the phone speaker and walkie talkie to evacuate, stand by, stay indoors or may release students to go home.
3. Safety Response Team will listen to the battery or crank-operated radio for further emergency information.

Electrical/Gas/Water Failure

1. Executive Director will notify the electrical company at [800-743-5000] water utility company at [415-945-1455] and/or the Fire Department at 415-473-6717
2. Safety Response Team will make an announcement over the PA or megaphone to evacuate or stand by.
3. Office staff and classroom teachers turn off computers and other equipment that might be damaged by a power surge when the service is restored.

Chemical Spill/Biological Threat

If substance released indoors:

1. Safety Response Team will make an announcement over the intercom speaker or walkie talkie to evacuate the building.
2. Safety Response Team will call 911 and the local fire department.
3. Safety Response Team locks or ropes off area – DO NOT TOUCH ANYTHING.
4. Evacuate room and TURN OFF air conditioning system.
5. If N95 masks are accessible, all staff and students should place them over their noses and mouths.
6. Any persons who contacted the substance should wash with soap and water in the bathroom. Contaminated clothing should be immediately removed. Contaminated persons should remain in the bathroom separate from the general school population. A list of contaminated persons should be provided to the Executive Director.
7. Safety Response Team should check for chemical safety data to determine clean-up procedure with custodians.

If substance released outdoors:

1. Upon hearing of a chemical leak (usually from the fire department or other city office) the Executive Director will determine if students should be evacuated.
2. Safety Response Team will make an announcement over the PA or megaphone to evacuate the building or stay indoors.
3. Close doors and windows and TURN OFF air conditioning / HVAC system.
4. If N95 masks are accessible, all staff and students should place them over their nose and mouth.
5. If it is necessary to leave the site, move crosswind, never more directly with or against the wind which may carry fumes.
6. Any persons who contacted the substance should wash with soap and water in the bathroom. Contaminated clothing should be immediately removed. Contaminated persons should remain in the bathroom separate from the general school population. A list of the contaminated people should be provided to the Executive Director.
7. Give first aid.
8. Do not reopen the school campus until ALL CLEAR response is activated by the Safety Response Team.

Explosion

If explosion is indoors on school campus:

1. All drop down to the floor and DROP AND COVER.
2. Turn away from the windows.
3. Take cover under a desk or table or against an interior wall.
4. Cover head with arms or hold to the cover.
5. After the initial blast, the Safety Response Team will consider the possibility of another imminent explosion, call 911 and elect the appropriate response which may include staying indoors or evacuating the building.
6. Once safely assembled in the Emergency Meeting Area, Teachers will take roll and report missing persons to the Safety Response Team.

If explosion is outdoors in surrounding areas:

1. Safety Response Team will activate STAY INDOORS.
2. Safety Response Team will call 911.
3. All remain indoors until the ALL CLEAR signal is given by the Safety Response Team.

Death/Suicide

1. Board Leadership and the Executive Director will be notified in the event of a death or suicide on campus.
2. Safety Response Team will phone 911 and the County Office of Education.
3. Safety Response Team will activate STAY INDOORS.
4. Executive Director will control and organize media.
5. Safety Response Team and/or Executive Director will notify relatives where the victim(s) have been taken and not divulge unnecessary details.

6. Assigned person(s) will ensure that counseling services are available as soon as possible.

Adaptation for Students with Disabilities

Students with known disabilities should have emergency response accommodations noted in their 504 or IEP to indicate additional assistance that may need to be implemented in case of various emergencies covered by this safety plan. Students with known disabilities will also have a pre-designated location in their classrooms that are reserved for them during lockdown, shelter-in-place, and earthquakes.

In the event of an emergency, students with disabilities may have an additional staff person assigned to their classroom to carry out accommodations and assistance with disaster response procedures. The additional staff person will assist the student and teacher during the emergency response.

General Strategies for Assisting Individuals with Disabilities During an Evacuation

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

To alert visually impaired individuals

- Announce the type of emergency.
- Offer your arm for guidance.
- Tell the person where you are going, obstacles you encounter.

When you reach safety, ask if further help is needed.

To alert individuals with hearing limitations

- Turn lights on/off to gain a person's attention -OR-
- Indicate directions with gestures -OR-

Write a note with **EVACUATION** directions.

To evacuate individuals using crutches, canes or walkers

- **Evacuate** these individuals as injured persons.
- Assist and accompany to **EVACUATION** site, if possible -OR-
- Use a sturdy chair (or one with wheels) to move person -OR-

Help carry individuals to safety.

To evacuate individuals using wheelchairs

- Give priority assistance to wheelchair users with electrical respirators.
- Most wheelchairs are too heavy to take downstairs; consult with the person to determine the best carry options.

Reunite the person with the wheelchair as soon as it is safe to do so.

Reunification Plan

After an emergency situation is resolved, if deemed necessary, we will initiate the reunification process where all students must be picked up by a parent, guardian, or authorized caregiver.

Reunification from Classrooms

Step 1 Return	<ul style="list-style-type: none"> ● Teachers will lead their students to return to homeroom classrooms quietly.
Step 2 Role Assignment	<p>Safety Response Team will assign members to the following roles:</p> <ul style="list-style-type: none"> ● (1) Identifier: to locate at Point of Entry, equipped with a list of students and their parents ● (2) Runners: to retrieve students from classrooms ● (1) Guard at Point of Exit: to prevent unauthorized entrance
Step 3 Area Designation	<p>The Safety Response Team will designate the following areas and mark with signage</p> <ul style="list-style-type: none"> ○ Point of Entry - Gravel Parking Lot ○ Reunification Point - Classrooms or Dining Hall ○ Point of Exit - Main Entrance/Exit ○ First Aid Station - Office- Little House
Step 4 Student Release Procedure	<ul style="list-style-type: none"> ● Parents will come to the Point of Entry and fill out a Student Release Form with the student name, grade and class and provide proof of identity. ● The Identifier on the Safety Response Team will be at the Point of Entry with a list of students and their parents, and will verify all information. ● Once identity is verified, a Runner will collect the Student Release Form and retrieve the student from their classroom or Dining Hall and bring them to the Reunification Point. The parent will be directed to the Reunification Point as well. ● Support Services will be available at the Reunification Point ● Once the parent and the student are ready to leave, they will be escorted through the Point of Exit.

Reunification from Evacuation Point

Step 1 Line-up	<ul style="list-style-type: none"> ● Students will line up with their homeroom teacher and sit quietly. Classes will be lined up according to grade.
Step 2 Role Assignment	<p>Safety Response Team will assign members to the following roles:</p> <ul style="list-style-type: none"> ● (1) Identifier: to located at Point of Entry, equipped with a list of students and their parents ● (2) Runners: to retrieve students from classrooms ● (1) Guard at Point of Exit: to prevent unauthorized entrance
Step 3 Area Designation	<p>The Safety Response Team will designate the following areas and mark with signage</p> <ul style="list-style-type: none"> ○ Point of Entry - Gravel Parking Lot ○ Reunification Point - Classrooms or Dining Hall ○ Point of Exit - Main Entrance/Exit ○ First Aid Station - Office- Little House
Step 4 Student Release Procedure	<ul style="list-style-type: none"> ● Parents will come to the Point of Entry and fill out a Student Release Form with the student name, grade and class and provide proof of identity.

	<ul style="list-style-type: none"> ● The Identifier on the Safety Response Team will be at the Point of Entry with a list of students and their parents, and will verify all information. ● Once identity is verified, a Runner will collect the Student Release Form and retrieve the student from their classroom and bring them to the Reunification Point. The parent will be directed to the Reunification Point as well. ● Support Services will be available at the Reunification Point ● Once the parent and the student are ready to leave, they will be escorted through the Point of Exit.
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Safety Response Team Members

Name	Role
Tamara Lemesh	Vice Principal
Adam Bieniek	Office Administrator
Name	Office Administrator
Stephanie Felton-Priestner	Director

Emergency Drill Schedule

It is the Operations Team’s responsibility to schedule emergency drills throughout the year and record the date and time of each drill. The following drills are required:

- **Fire Drill:** At least once per month, a fire drill should be conducted in which all pupils, teachers, and other employees are required to vacate the building. The fire alarm should be tested every month, but this can be completed while students are off site in months when a fire drill is not performed.
- **Earthquake Drop & Cover Drill:** This drill should be performed twice per school year.
- **Major Disaster Drill:** This drill should be performed twice per school year so personnel are oriented to the School’s Major Disaster Plan.
- **Lock Down Drill:** This drill should be performed twice per school year.

2025-2026 Safety Drill Schedule

Date	Type of Drill	Procedure/Location
September 23rd	Earthquake	Stop-Drop-Cover
September 24th	Fire	Evacuation Meeting Place by Dining Hall
October 9th	Fire	Evacuation Meeting Place by Dining Hall
November 9th	Intruder on Campus	Lock classroom door, and stay inside until all is clear
November 14th	Fire	

Date	Type of Drill	Procedure/Location
September 23rd	Earthquake	Stop-Drop-Cover
September 24th	Fire	Evacuation Meeting Place by Dining Hall
December 8th	Earthquake	Stop-Drop-Cover
December 18th	Fire	Evacuation Meeting Place by Dining Hall
January 21st	Fire	Evacuation Meeting Place by Dining Hall
February 26th	Intruder on Campus	Lock classroom door, and stay inside until all is clear
March 13rd	Fire	Stop-Drop-Cover
March 23rd	Earthquake	Evacuation Meeting Place by Dining Hall
April 17th	Fire	Evacuation Meeting Place by Dining Hall
May 8th	Fire	

Teachers must bring the following to the evacuation center located at the Dining Hall:

- Red Emergency Backpack
- Walkie Talkie

**Dates and times are subject to change.*

Training

We provide training on emergency drills to teachers and staff during our beginning of the year professional learning week as well as on the professional learning day on each Friday before the drill. We also send out email reminders on the drill procedures one day before the drill to remind the teachers.

Teachers conduct training for students according to their own schedule.

Safety Response Team developed checklists for every type of drill. We consolidate feedback for improvement after each drill, update our drill procedures as needed, and re-train the teachers and students accordingly.

Lockdown Drill Guidelines

1. Lockdown drills shall not be “high-intensity” drills. This means they will not include simulations that mimic an active shooter or other armed assailant incident, and shall not, (i) use fake blood or theatrical makeup or other materials to give the impression of injury or death, (ii) shall not involve the use of actors or other individuals posing as armed assailants or victims, and (iii) shall not train students to actively resist an assailant by throwing objects, attacking, or swarming the assailant.

2. Lockdown drills shall not use real weapons, gunfire blanks, or explosions.

3. The school will ensure a trauma-informed approach to the design and implementation of the drill that ensures the drill process:

- (i) is age and developmentally appropriate,
- (ii) is only conducted after advance notice of the drill and its expected length of time are given to all parents/guardians and school employees subject to the drill;
- (iii) provides an opportunity for parents/guardians to opt out their student out of the drill;
- (iv) is preceded by an announcement of the lockdown drill and is followed by a closing announcement;
- (v) is followed by a notice to parents/guardians after the drill has concluded; and
- (vi) provides contact information for community-based resources to parents/guardians, students, and staff who are negatively impacted by the drills, which prioritizes school-based resources.

Emergency Contact Datasheet

Emergency Phone Numbers

Entity	Number
Emergency	911 OR 415-472-0911
[Fairfax] Police Department	415-453-5330
[Marin County Fire Dept. Woodacre] Fire Department	415-473-6717
American Red Cross, North Bay Chapter - Marin County	415-721-2365
County Sheriff, Office of Emergency Services	415-473-6584
MarinHealth Medical Center	415-925-7000
Kentfield Hospital	415-456-9680
MarinHealth Medical Center Emergency Room	415-925-7000
Electric Utility	800-743-5000
Water Utility	415-945-1455
California Poison Control System Hotline	1-800-222-1222
Marin Emergency Radio Authority Frequencies	Sheriff Low Band: 39.240
	Marin County Fire Mutual Aid Net: 151.040
	Marin County Fire Command Net: 156.240
	Medcial Mutual Aid: 155.100
	Tamalpais Fire Crew: 154.205
	Marin County Fire Tac 1: 154.740
	Marin County Fire Tac 2: 155.655

Emergency Broadcast Stations

NOAA: 162.400 MHz (SF) and 162.500 MHz

KCBS 740 AM

KGO 810 AM

School Maps

[Bothin Site Map.pdf](#)

IV. SEMS (Standardized Emergency Management System Plan)

Roles and Responsibilities

Incident Commander: [Stephanie Felton-Priestner]

The Incident Commander is the decision maker for the impacted school who is responsible for emergency operations to ensure safety of students, staff and others who are on campus. The Incident Commander (IC) shall remain at the Command Center to observe and direct all operations. Below is a checklist of responsibilities (can be delegated).

1. Assume command
2. Communicate a "signal" to the students and staff identifying the type of emergency
3. Call 911
4. Notify other administration leaders, Campus Supervisors, Support Staff, and on-campus childcare of the emergency
5. Activate the Emergency Plan components as needed (Command Staff, Plans, Operations, Logistics, and/or Finance) and establish a Command Center
6. Conduct initial briefing with the Command Staff
7. Monitor local emergency radio stations for local news
8. Utilize your Deputy Incident Commander to cover the Command Center, take regular breaks (5 minutes each hour, away from the Command Center)
9. Create an action plan with specific objectives including strategies to review and evaluate
10. Make provisions for language translators
11. Release teachers, as appropriate
12. Public Information Officer Review all incident information before release to the news media, parents or general public
13. Signal all-clear (Police Only will signal; if present)
14. Begin "Student Release Procedures" when appropriate.
15. Create an action plan with specific objectives for returning to normal operations
16. Debrief staff, parents/community, and students

Deputy Incident Commander: [Tamara Lemesh]

The Deputy Incident Commander assists the IC and takes over the duties of the IC if the IC is absent, has to leave or is unable to do their job. Below is a checklist of responsibilities.

1. Report to, attend briefings from, and assist the IC
2. Keep unauthorized people away from the IC
3. Responsible for Emergency Plans

Command Staff - Emergency Operations Coordinator: [Tamara Lemesh]

The Emergency Operations Coordinator facilitates the overall functioning of the Command Staff. Below is a checklist of responsibilities.

1. With the assistance of the Liaison Officer, coordinate outside agencies and define roles/responsibilities
2. Report to IC and attend briefings
3. Assist unit coordinators (Plans, Operations, Logistics and Finance), as needed
4. Indicate the process for emergency declarations
5. Develop status boards
6. Maintain a "position" log of staff
7. Monitor Command Staff for signs of stress or under-performance
8. Fill any unstaffed positions

Command Staff - Safety Officer: [Stephanie Felton-Priestner]

The Safety Officer ensures that all activities are conducted in as safe a manner as possible under the circumstances. The Safety Officer is the only person other than the IC who has the authority to stop an authorized plan from being put into action. Below is a checklist of responsibilities.

1. Attend briefings with IC
2. Monitor, assess, and correct operational activities for dangerous and unsafe conditions
3. Monitor stress levels of personnel involved in the response
4. If directed by IC, turn off gas supply, water supply and/or electricity
5. Oversee "Logistics" for equipment and supplies

Command Staff - Training Coordinator/Student Support Services: [Tamara Lemesh]

The Training Coordinator is responsible for all training prior to the incident. Below is a checklist of responsibilities.

1. Attend briefings with IC
2. Train staff prior to an emergency

Command Staff - Public Information Officer: [Heather Deyton]

The Public Information Officer acts as the official spokesperson for the school site in an emergency situation. A school site-based PIO should only be used if the media is on campus and the school PIO is not available or forthcoming. Below is a checklist of responsibilities.

1. Contact the Executive Director, Office Manager, School Board of Directors, and families as appropriate.
2. Contact administrator in charge of student support services to assign psychologists and counselors to the site.
3. Attend briefings with IC.
4. Identify yourself as the "PIO" with a vest, visor, or sign.
5. Establish a media information center away from the command post and students. Advise arriving media that the site is preparing a press release and approximate time of its issue.
6. Statements to media should include the following: cause, time, event, current situation, care being given, injuries, evacuation plans, student release location, resources in use, best routes to school, and any other information school wishes to be released to the public.
7. Convey that everything is going to be okay. Answer questions completely and truthfully. Avoid speculation, bluffing, inaccuracies, talking off the record, arguing and using the phrase "no comment." Repeat what you want the press to hear.
8. Ensure announcements and other information are translated into other languages as needed.
9. Assist with rumor control.
10. Keep all documentation to support the history of the event.
11. Remind staff and volunteers to refer all questions from media or waiting parents to the PIO.
12. Monitor new broadcasts about the incident; correct any misinformation heard.

Plans Chief: [Adam Bieniek]

The Plans Chief oversees the function of the action plan by documenting, disseminating information, assessing the seriousness of the incident, demobilization, etc. Staff is assigned to assist with these jobs. Below is a checklist of responsibilities.

1. Attend briefings with IC
2. Documentation Team
 - a. Develop, distribute, and document all actions and site maps
 - b. Receive and record student/staff attendance rosters
 - c. Collect completed student release forms from the Parent Emergency pick-up location
 - d. Complete a list of students/staff missing, absent, and medical for Emergency pick-up location

3. Message Team
 - a. Maintain a message board
4. Communication Team
 - a. Record, collect, and evaluate information (keep all original notes – they are legal documents)
 - b. Monitor radio for local news
 - c. Maintain display boards for shelter status, transportation status, telephone numbers, school status, etc.
5. Damage Assessment Team
 - a. Report damage to Plans Chief who will report to IC
 - b. Use site and area maps to record site and surrounding area damages (i.e. road closures, utility outages, etc.)
6. Demobilization Team
 - a. Deploy and supervise personnel as needed to gather and assess intelligence information
7. Disaster Plan Update Team
 - a. Provide ongoing analysis of situation to Plans Chief who will report it to IC
 - b. Report status of resources
 - c. Prepare estimates of incident escalation or de-escalation
 - d. Report missing, absent, and medical students/staff to IC
8. Web Page Update Team
 - a. Using the school's or district's web page, communicate disaster updates to the community

Operations Chief: [Tamara Lemesh]

The Operations Chief exercises the functions of the operation by carrying out the plan, developing tactical objectives and directing all resources. Staff are assigned to assist with the jobs. Below is a checklist of responsibilities

1. Attend briefings with IC
2. Search and Rescue Team
 - a. Remain in contact with Operations Chief by radio
 - b. Search rooms both visually and vocally. Use chalk, grease pencil, etc. to mark slash (/) on door when entering room, and when leaving room complete search by closing slash in (X) on door.
 - c. As rooms are reported clear, radio to Operations Chief to mark "C" on site map
 - d. Utilize other teams as needed (Patient Transport, Morgue and First Aid). Do not use names of students/staff on radio/map
 - e. Record Triage on site map (I – Immediate; D – Delay; and DEAD – Dead)
3. Facilities/Hazardous Materials Team
 - a. Report gas/water leaks, fires or structural damage, to Operations Chief (gas, water and electricity shut-off needs approval of IC. Use yellow caution tape where necessary)

- b. Record assessment of facilities and hazardous materials on site map
 - c. Photograph damage if possible before repair
- 4. Security Team
 - a. Lock gates and secure major external doors
 - b. Verify that campus is locked down to Operations Chief, who will report it to IC
 - c. Report non-staff and non-students to Operations Chief, who will report it to IC
 - d. Route all parents to "Parent Pick-up Area"
- 5. Patient Transport and Morgue Team
 - a. Transport patients to First Aid; do not transport to morgue unless directed by Operations Chief
 - b. Mark DEAD on tag listing date/time found, exact location found, name of DEAD, person who identified, and name of person filling out tag; attach one tag to DEAD and one tag to plastic bag if body is in bag
- 6. Medical-First Aid Team
 - a. Keep accurate records
 - b. Report deaths immediately to Operations Chief who will report it immediately to IC
 - c. Establish what I-Immediate and D-Delayed treatments will be
 - d. Consult with Wing Leaders regarding health care, medications, and meals for students and staff with known medical conditions (asthma, diabetes, etc.)
 - e. Establish scope of disaster with Operations Chief and determine probability of outside emergency medical support and transport needs. Emergency card must accompany student removed from campus to receive advanced medical treatment
- 7. Parent Pick-up Team (in reunification process)
 - a. Designate "Request Area/Gate" and "Release Area/Gate" for parents to pick-up; mark with signs
 - b. Verify that adult completing student release form is on student's emergency card; retain form for record
 - c. If student is in class, have runner go to class and bring student to pick-up area
 - d. Release younger students first
 - e. Escort parent to Safety Response Team if student is missing or with Search and Rescue Team
 - f. Escort parent to medical area if student is receiving treatment
 - g. Teachers/Staff Wing Leaders
 - h. Liaison between teams and students/staff for communication, assistance, etc.
 - i. Assist teachers with attendance; buddy system and supervisor, if needed
- 8. Shelter Set-up Team
 - a. Sleeping/living areas should be 40 square feet per person and good ventilation

- b. Designate storage area for food and supplies that can be accessed by truck
- c. Improvise toilets, if necessary, using 5 gallon buckets/trash cans and trash liners
- d. Keep medication locked up, if possible

Logistics Chief: [Adam Bieniek]

The Logistics Chief is responsible for providing facilities, personnel, services and resources to meet the needs of the incident. Below is a checklist of responsibilities.

1. Attend briefings with IC
 - a. Supply Teams (Command, Search and Rescue, Medical, Student/Staff, Transport, Morgue, and Builders/Sanitation)
 - b. Maintain a visible chart of resources
 - c. Determine water supply needs (1/2 gallon/day/person and 5 gallons/day for other uses)
 - d. Determine food supply needs (2500 calories/day/person/; approximately 3 ½ pounds unprepared food)
 - e. Obtain supplies other than food and water
 - f. Provide ability to transport staff/students if necessary throughout the city (i.e. medical, etc.)
2. Builders/Sanitation Team
 - a. Set up food preparation facilities, command post shelter area, parent pick-up area, supply check-out area, medical area, assembly area, morgue, etc.
 - b. Obtain sanitary supplies (1 toilet/40 persons; 6 toilets/200 persons; 14 toilets/500 persons)
 - c. Maintain computer support

Finance Chief: [Mark Puccinelli]

The Finance Chief is responsible for monitoring costs related to incident, procurements, claims and community helpers. Below is a checklist of responsibilities.

1. Attend briefings with IC
2. Claims/Procurements /Community Helpers Team
 - a. Track financial records, staff hours, purchasing, etc.
 - b. Complete state and federal claim forms for IC
 - c. Make prior agreements with closest stores (i.e. Safeway, etc.) for supplies
 - d. Make prior arrangements with community helpers (i.e. retired doctors, etc.)
 - e. Do a cost analysis of incident/disaster

V. School Safety Practices, Policies and Procedures

Child Abuse and Neglect Reporting

California Penal Code section 11166 requires any child care custodian who has knowledge of, or observes, a child in his or her professional capacity or within the scope of his or her employment whom he or she knows or reasonably suspects has been the victim of child abuse to report the known or suspected instance of child abuse to a child protective agency immediately, or as soon as practically possible, by telephone and to prepare and send a written report thereof within thirty-six (36) hours of receiving the information concerning the incident.

Heartwood Charter School will provide annual training on the mandated reporting requirements, using the online training module provided by the State Department of Social Services, to employees who are mandated reporters. Mandated reporter training will also be provided to employees hired during the course of the school year. This training will include information that failure to report an incident of known or reasonably suspected child abuse or neglect, as required by Penal Code section 11166, is a misdemeanor punishable by up to six (6) months confinement in a county jail, or by a fine of one-thousand dollars (\$1,000), or by both that imprisonment and fine.

All employees required to receive mandated reporter training must provide proof of completing the training within the first six (6) weeks of each school year or within the first six (6) weeks of that employee's employment.

Suspension and Expulsion Policy and Procedures

Suspension and Expulsion Policy

The Pupil Suspension and Expulsion Policy has been established in order to promote learning and protect the safety and well-being of all students at Heartwood Charter School. In creating this policy, Heartwood Charter School has reviewed Education Code Section 48900 et seq. which describes the non-charter schools' list of offenses and procedures to establish its list of offenses and procedures for suspensions and expulsions. The language that follows closely mirrors the language of Education Code Section 48900 et seq. Heartwood Charter School is committed to an annual review of policies and procedures surrounding suspensions and expulsions and, as necessary, modification of the lists of offenses for which students are subject to suspension or expulsion.

When the Policy is violated, it may be necessary to suspend or expel a student from Heartwood Charter School. This policy shall serve as Heartwood Charter Schools' policy and procedures for student suspension and expulsion, and it may be amended from time to time without the need to amend the charter so long as the amendments comply with legal requirements.

Charter School staff shall enforce disciplinary rules and procedures fairly and consistently among all students. This Policy and its Procedures will clearly describe discipline expectations.

Discipline includes but is not limited to advising and counseling students. Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of or willfully causing the infliction of physical pain on a student. For purposes of the policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent damage to school property.

Heartwood Charter School administration shall ensure that students and their parents/guardians are notified in writing upon enrollment of all discipline policies and procedures. The notice shall state that this Policy and Procedures are available in the Parent/Student Handbook.

Suspended or expelled students shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension or expulsion. A student identified as an individual with disabilities or for whom Heartwood Charter School has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities Education Improvement Act of 2004 ("IDEA") or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 ("Section 504") is subject to the same grounds for suspension and expulsion and is accorded the same due process procedures applicable to regular education students except when federal and state law mandates additional or different procedures. Heartwood Charter School will follow all applicable federal and state laws, including, but not limited to, the IDEA, Section 504, the California Education Code, and their implementing regulations, when imposing any form of discipline on a student identified as an individual with disabilities or for whom Heartwood Charter School has a basis of knowledge of a suspected disability or who is otherwise qualified for such services or protections in according due process to such students. No student shall be involuntarily removed by the Charter School for any reason unless the parent or guardian of the student has been provided written notice of intent to remove the student no less than five (5) schooldays before the effective date of the action. The written notice shall be in the native language of the student or the student's parent or guardian or, if the student is a foster child or youth or a homeless child or youth, the student's educational rights holder, and shall inform him or her of the right to initiate the procedures specified below for suspensions, before the effective date of the action. If the student's parent, guardian, or educational rights holder initiates the procedures specified below for suspensions, the student shall remain enrolled and shall not be removed until the Charter School issues a final decision. As used herein, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include suspensions or expulsions pursuant to the suspension and expulsion procedures described below.

- A. Grounds for Suspension and Expulsion of students A student may be suspended or expelled for prohibited misconduct if the act is related to school activity or school attendance occurring at any time including but not limited to: a) while on school grounds; b) while going to or coming from school; c) during the lunch period, whether on or off the school campus; d) during, going to, or coming from a school-sponsored activity.

B. Enumerated Offenses

- a. Discretionary Suspension Offenses. Students may be suspended for any of the following acts when it is determined the pupil:
 - i. Caused, attempted to cause, or threatened to cause physical injury to another person.
 - ii. Willfully used force or violence upon the person of another, except self-defense.
 - iii. Unlawfully possessed, used, sold or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage, or intoxicant of any kind.
 - iv. Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.
 - v. Committed or attempted to commit robbery or extortion.
 - vi. Caused or attempted to cause damage to school property or private property, which includes, but is not limited to, electronic files and databases.
 - vii. Stole or attempted to steal school property or private property, which includes, but is not limited to, electronic files and databases.
 - viii. Possessed or used tobacco or products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel. This section does not prohibit the use of his or her own prescription products by a pupil.
 - ix. Committed an obscene act or engaged in habitual profanity or vulgarity.
 - x. Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code Section 11014.5.
 - xi. Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, other school officials, or other school personnel engaged in the performance of their duties. This section shall apply to pupils in any of grades 4 to 12, inclusive.
 - xii. Knowingly received stolen school property or private property, which includes, but is not limited to, electronic files and databases.
 - xiii. Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
 - xiv. Committed or attempted to commit a sexual assault as defined in Penal Code Sections 261, 266c, 286, 288, 288a or 289, or committed a sexual battery as defined in Penal Code Section 243.4.

- xv. Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.
- xvi. Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma. Engaged in, or attempted to engage in hazing. For the purposes of this subdivision, "hazing" means a method of initiation or preinitiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this section, "hazing" does not include athletic events or school sanctioned events.
- xvii. Made terroristic threats against school officials and/or school property, which includes, but is not limited to, electronic files and databases. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school property, which includes, but is not limited to, electronic files and databases, or the personal property of the person threatened or his or her immediate family.
- xviii.
- xix. Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.
- xx. Caused, attempted to cause, threatened to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This section shall apply to pupils in any of grades 4 to 12, inclusive.
- xxi. Intentionally harassed, threatened or intimidated school personnel or volunteers and/or a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting

- classwork, creating substantial disorder and invading the rights of either school personnel or volunteers and/or student(s) by creating
- xxii. an intimidating or hostile educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.
- xxiii. Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act.
1. "Bullying" means any severe or pervasive physical or verbal act or conduct, including communications made in writing or by means of an electronic act, and including one or more acts committed by a student or group of students which would be deemed hate violence or harassment, threats, or intimidation, which are directed toward one or more students that has or can be reasonably predicted to have the effect of one or more of the following:
 - a. Placing a reasonable student (defined as a student, including, but is not limited to, a student with exceptional needs, who exercises average care, skill, and judgment in conduct for a person of his or her age, or for a person of his or her age with exceptional needs) or students in fear of harm to that student's or those students' person or property.
 - b. Causing a reasonable student to experience a substantially detrimental effect on his or her physical or mental health.
 - c. Causing a reasonable student to experience substantial interference with his or her academic performance.
 - d. Causing a reasonable student to experience substantial interference with his or her ability to participate in or benefit from the services, activities, or privileges provided by the Charter School.
 2. "Electronic Act" means the creation or transmission originated on or off the school site, by means of an electronic device, including, but not limited to, a telephone, wireless telephone, or other wireless communication device, computer, or pager, of a communication, including, but not limited to, any of the following:
 - a. A message, text, sound, video, or image.
 - b. A post on a social network Internet Web site including, but not limited to:
 - i. Posting to or creating a burn page. A "burn page" means an Internet Website created for the purpose of having one or more of the effects as listed in subparagraph (1) above.
 - ii. Creating a credible impersonation of another actual pupil for the purpose of having one or more of the effects listed in subparagraph (1) above.

- iii. “Credible impersonation” means to knowingly and without consent impersonate a pupil for the purpose of bullying the pupil and such that another pupil would reasonably believe, or has reasonably believed, that the pupil was or is the pupil who was impersonated.
 - c. Creating a false profile for the purpose of having one or more of the effects listed in subparagraph (1) above. “False profile” means a profile of a fictitious pupil or a profile using the likeness or attributes of an actual pupil other than the pupil who created the false profile.
- 3. An act of cyber sexual bullying.
 - a. For purposes of this clause, “cyber sexual bullying” means the dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a pupil to another pupil or to school personnel by means of an electronic act that has or can be reasonably predicted to have one or more of the effects described in subparagraphs (i) to (iv), inclusive, of paragraph (1). A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photograph or other visual recording of a minor where the minor is identifiable from the photograph, visual recording, or other electronic act.
 - b. For purposes of this clause, “cyber sexual bullying” does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities. educational, political, or scientific value or that involves athletic events or school-sanctioned activities.
- 4. Notwithstanding subparagraphs (1) and (2) above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet. A pupil who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, except that a pupil who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (1)(a)-(b). Possessed, sold, or otherwise furnished any knife unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item

from a certificated school employee, with the Superintendent or designee's concurrence.

- xxiv. Non-Discretionary Suspension Offenses: Students must be suspended and recommended for expulsion for any of the following acts when it is determined the pupil:
1. Possessed, sold, or otherwise furnished any firearm, explosive, or other dangerous object unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Superintendent or designee's concurrence.
- xxv. Discretionary Expellable Offenses: Students may be recommended for expulsion for any of the following acts when it is determined the pupil:
1. Caused, attempted to cause, or threatened to cause physical injury to another person.
 2. Willfully used force or violence upon the person of another, except self-defense.
 3. Unlawfully possessed, used, sold or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code Sections 11053- 11058, alcoholic beverage, or intoxicant of any kind.
 4. Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code Sections 11053- 11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.
 5. Committed or attempted to commit robbery or extortion.
 6. Caused or attempted to cause damage to school property or private property, which includes, but is not limited to, electronic files and databases.
 7. Stole or attempted to steal school property or private property, which includes, but is not limited to, electronic files and databases.
 8. Possessed or used tobacco or products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel. This section does not prohibit the use of his or her own prescription products by a pupil.
 9. Committed an obscene act or engaged in habitual profanity or vulgarity.
 10. Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code Section 11014.5.
 11. Knowingly received stolen school property or private property, which includes, but is not limited to, electronic files and databases.

12. Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
13. Committed or attempted to commit a sexual assault as defined in Penal Code Sections 261, 266c, 286, 288, 288a or 289, or committed a sexual battery as defined in Penal Code Section 243.4.
14. Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.
15. Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.
16. Engaged in, or attempted to engage in hazing. For the purposes of this subdivision, "hazing" means a method of initiation or preinitiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this section, "hazing" does not include athletic events or school-sanctioned events.
17. Made terroristic threats against school officials and/or school property, which includes, but is not limited to, electronic files and databases. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school property, which includes, but is not limited to, electronic files and databases, or the personal property of the person threatened or his or her immediate family.
18. Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable

person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.

19. Caused, attempted to cause, threatened to cause or participated in an act of hate violence, as defined in subdivision of Section 233 of the Education Code. This section shall apply to pupils in any of grades 4 to 12, inclusive.
20. Intentionally harassed, threatened or intimidated school personnel or volunteers and/or a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting classwork, creating substantial disorder and invading the rights of either school personnel or volunteers and/or student(s) by creating an intimidating or hostile educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.
21. Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act.
 - a. "Bullying" means any severe or pervasive physical or verbal act or conduct, including communications made in writing or by means of an electronic act, and including one or more acts committed by a student or group of students which would be deemed hate violence or harassment, threats, or intimidation, which are directed toward one or more students that has or can be reasonably predicted to have the effect of one or more of the following:
 - i. Placing a reasonable student (defined as a student, including, but is not limited to, a student with exceptional needs, who exercises average care, skill, and judgment in conduct for a person of his or her age, or for a person of his or her age with exceptional needs) or students in fear of harm to that student's or those students' person or property.
 - ii. Causing a reasonable student to experience a substantially detrimental effect on his or her physical or mental health.
 - iii. Causing a reasonable student to experience substantial interference with his or her academic performance.
 - iv. Causing a reasonable student to experience substantial interference with his or her ability to participate in or benefit from the services, activities, or privileges provided by the Charter School.

- b. “Electronic Act” means the creation or transmission originated on or off the school site, by means of an electronic device, including, but not limited to, a telephone, wireless telephone, or other wireless communication device, computer, or pager, of a communication, including, but not limited to, any of the following:
1. A message, text, sound, video, or image.
 2. A post on a social network Internet Web site including, but not limited to:
 - a. Posting to or creating a burn page. A “burn page” means an Internet Web site created for the purpose of having one or more of the effects as listed in subparagraph (1) above.
 - b. Creating a credible impersonation of another actual pupil for the purpose of having one or more of the effects listed in subparagraph (1) above. “Credible impersonation” means to knowingly and without consent impersonate a pupil for the purpose of bullying the pupil and such that another pupil would reasonably believe, or has reasonably believed, that the pupil was or is the pupil who was impersonated.
 - c. Creating a false profile for the purpose of having one or more of the effects listed in subparagraph (1) above. “False profile” means a profile of a fictitious pupil or a profile using the likeness or attributes of an actual pupil other than the pupil who created the false profile.
 3. An act of cyber sexual bullying.
 - a. For purposes of this clause, “cyber sexual bullying” means the dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a pupil to another pupil or to school personnel by means of an electronic act that has or can be reasonably predicted to have one or

more of the effects described in subparagraphs (i) to (iv), inclusive, of paragraph (1). A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photograph or other visual recording of a minor where the minor is identifiable from the photograph, visual recording, or other electronic act.

b. For purposes of this clause, “cyber sexual bullying” does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities.

4. Notwithstanding subparagraphs (1) and (2) above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.

ii. A pupil who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, except that a pupil who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (3)(a)-(b).

iii. Possessed, sold, or otherwise furnished any knife unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Superintendent or designee’s concurrence.

1. Non-Discretionary Expellable Offenses:
Students must be recommended for expulsion for any of the following acts when it is determined pursuant to the procedures below that the pupil:

- a. Possessed, sold, or otherwise furnished any firearm, explosive, or other dangerous object unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Superintendent or designee's concurrence. If it is determined by the Administrative Panel and/or Board of Directors that a student has brought a firearm or destructive device, as defined in Section 921 of Title 18 of the United States Code, onto campus or to have possessed a firearm or dangerous device on campus, the student shall be expelled for one year, pursuant to the Federal Gun Free Schools Act of 1994. In such instances, the pupil shall be provided due process rights of notice and a hearing as required in this policy. The term "firearm" means (A) any weapon (including a starter gun) which will or is designed to or may readily be converted to expel a projectile by the action of an explosive; (B) the frame or receiver of any such weapon; (C) any firearm muffler or firearm silencer; or (D) any destructive device. Such term does not include an antique firearm. The term "destructive device" means (A) any explosive, incendiary, or poison gas, including but not limited to: (i) bomb, (ii) grenade, (iii) rocket having a propellant charge of more than four ounces, (iv) missile having an explosive or incendiary charge of more than one-quarter ounce, (v) mine, or (vi) device similar to any of the devices described in the preceding clauses.

- C. Suspension Procedure Suspensions shall be initiated according to the following procedures:
- a. Conference Suspension shall be preceded, if possible, by a conference conducted by the Superintendent or designee with the student and his or her parent and, whenever practical, the teacher, supervisor or Charter School employee who referred the student to the President & CEO or designee. The conference may be omitted if the Superintendent or designee determines that an emergency situation exists. An “emergency situation” involves a clear and present danger to the lives, safety or health of students or Charter School personnel. If a student is suspended without this conference, both the parent/guardian and student shall be notified of the student’s right to return to school for the purpose of a conference. At the conference, the pupil shall be informed of the reason for the disciplinary action and the evidence against him or her and shall be given the opportunity to present his or her version and evidence in his or her defense, in accordance with Education Code Section 47605(b)(5)(J)(i). This conference shall be held within two (2) school days, unless the pupil waives this right or is physically unable to attend for any reason including, but not limited to, incarceration or hospitalization. No penalties may be imposed on a pupil for failure of the pupil’s parent or guardian to attend a conference with Charter School officials. Reinstatement of the suspended pupil shall not be contingent upon attendance by the pupil’s parent or guardian at the conference.
 - b. Notice to Parents/Guardians At the time of the suspension, the Superintendent or designee shall make a reasonable effort to contact the parent/guardian by telephone or in person. Whenever a student is suspended, the parent/guardian shall be notified in writing of the suspension and the date of return following suspension. This notice shall state the specific offense committed by the student. In addition, the notice may also state the date and time when the student may return to school. If Charter School officials wish to ask the parent/guardian to confer regarding matters pertinent to the suspension, the notice may request that the parent/guardian respond to such requests without delay.
 - c. Suspension Time Limits/Recommendation for Placement/Expulsion Suspensions, when not including a recommendation for expulsion, shall not exceed five (5) consecutive school days per suspension. Upon a recommendation of expulsion by the Superintendent or designee, the pupil and the pupil’s guardian or representative will be invited to a conference to determine if the suspension for the pupil should be extended pending an expulsion hearing. In such instances when the Charter School has determined a suspension period shall be extended, such extension shall be made only after a conference is held with the pupil or the pupil’s parents, unless the pupil and the pupil’s parents fail to attend the conference. This determination will be made by the Superintendent or designee upon either of the following determinations: 1) the pupil’s presence will be disruptive to the education process; or 2) the pupil poses a threat or danger to

others. Upon either determination, the pupil's suspension will be extended pending the results of an expulsion hearing

- D. Authority to Expel: As required by Education Code Section 47605(b)(5)(J)(ii), students recommended for expulsion are entitled to a hearing adjudicated by a neutral officer to determine whether the student should be expelled. The procedures herein provide for such a hearing and the notice of said hearing, as required by law. A student may be expelled either by the neutral and impartial Charter School Board of Directors following a hearing before it or by the Charter School Board of Directors upon the recommendation of a neutral and impartial Administrative Panel to be assigned by the Board of Directors as needed. The Administrative Panel shall consist of at least three members who are certificated and neither a teacher of the pupil nor a member of the Charter School Board of Directors. Each entity shall be presided over by a designated neutral hearing chairperson. The Administrative Panel may recommend expulsion of any student found to have committed an expellable offense, and the Board of Directors shall make the final determination.
- E. Expulsion Procedures: students recommended for expulsion are entitled to a hearing to determine whether the student should be expelled. Unless postponed for good cause, the hearing shall be held within thirty (30) school days after the Superintendent or designee determines that the pupil has committed an expellable offense. In the event an Administrative Panel hears the case, it will make a recommendation to the Governing Board for a final decision whether to expel. The hearing shall be held in closed session (complying with all pupil confidentiality rules under FERPA) unless the pupil makes a written request for a public hearing in open session three (3) days prior to the date of the scheduled hearing. Written notice of the hearing shall be forwarded to the student and the student's parent/guardian at least ten (10) calendar days before the date of the hearing. Upon mailing the notice, it shall be deemed served upon the pupil. The notice shall include:
- a. The date and place of the expulsion hearing
 - b. A statement of specific facts, charges and offenses upon which the proposed expulsion is based
 - c. A copy of Heartwood Charter School' disciplinary rules which relate to the alleged violation
 - d. Notification of the student's and/or parent/guardian's obligation to provide information about the student's status at the school to any other school district or school to which the student seeks enrollment
 - e. The opportunity for the student and/or the student's parent/guardian to appear in person or to employ and be represented by counsel or a non-attorney advisor
 - f. The right to inspect and obtain copies of all documents to be used at the hearing
 - g. The opportunity to confront and question all witnesses who testify at the hearing
 - h. The opportunity to question all evidence presented and to present oral and documentary evidence on the student's behalf including witnesses
- F. Special Procedures for Expulsion Hearings Involving Sexual Assault or Battery Offenses: Heartwood Charter School may, upon finding a good cause, determine that the disclosure of either the identity of the witness or the testimony of that witness at the

hearing, or both, would subject the witness to an unreasonable risk of psychological or physical harm. Upon this determination, the testimony of the witness may be presented at the hearing in the form of sworn declarations which shall be examined only by the Charter School or the hearing officer. Copies of these sworn declarations, edited to delete the name and identity of the witness, shall be made available to the pupil.

- a. The complaining witness in any sexual assault or battery case must be provided with a copy of the applicable disciplinary rules and advised of his/her right to (a) receive five (5) days' notice of his/her scheduled testimony, (b) have up to two (2) adult support persons of his/her choosing present in the hearing at the time he/she testifies, which may include a parent, guardian, or legal counsel, and (c) elect to have the hearing closed while testifying.
- b. Heartwood Charter School must also provide the victim a room separate from the hearing room for the complaining witness' use prior to and during breaks in testimony.
- c. At the discretion of the entity conducting the hearing, the complaining witness shall be allowed periods of relief from examination and cross-examination during which he or she may leave the hearing room.
- d. The entity conducting the expulsion hearing may also arrange the seating within the hearing room to facilitate a less intimidating environment for the complaining witness.
- e. The entity conducting the expulsion hearing may also limit time for taking the testimony of the complaining witness to the hours he/she is normally in school, if there is no good cause to take the testimony during other hours.
- f. Prior to a complaining witness testifying, the support persons must be admonished that the hearing is confidential. Nothing in the law precludes the entity presiding over the hearing from removing a support person whom the presiding person finds is disrupting the hearing. The entity conducting the hearing may permit any one of the support persons for the complaining witness to accompany him or her to the witness stand.
- g. If one or both of the support persons is also a witness, Heartwood Charter School must present evidence that the witness' presence is both desired by the witness and will be helpful to Heartwood Charter School. The person presiding over the hearing shall permit the witness to stay unless it is established that there is a substantial risk that the testimony of the complaining witness would be influenced by the support person, in which case the presiding official shall admonish the support person or persons not to prompt, sway, or influence the witness in any way. Nothing shall preclude the presiding officer from exercising his or her discretion to remove a person from the hearing whom he or she believes is prompting, swaying, or influencing the witness.
- h. The testimony of the support person shall be presented before the testimony of the complaining witness and the complaining witness shall be excluded from the courtroom during that testimony.
- i. Especially for charges involving sexual assault or battery, if the hearing is to be conducted in the public at the request of the pupil being expelled, the

complaining witness shall have the right to have his/her testimony heard in a closed session when testifying at a public meeting would threaten serious psychological harm to the complaining witness and there are not alternative procedures to avoid the threatened harm. The alternative procedures may include videotaped depositions or contemporaneous examination in another place communicated to the hearing by means of closed-circuit television.

- j. Evidence of specific instances of a complaining witness' prior sexual conduct is presumed inadmissible and shall not be heard absent a determination by the person conducting the hearing that extraordinary circumstances exist requiring the evidence be heard. Before such a determination regarding extraordinary circumstances can be made, the witness shall be provided notice and an opportunity to present opposition to the introduction of the evidence. In the hearing on the admissibility of the evidence, the complaining witness shall be entitled to be represented by a parent, legal counsel, or other support person. Reputation or opinion evidence regarding the sexual behavior of the complaining witness is not admissible for any purpose.
- G. Record of Hearing A record of the hearing shall be made and may be maintained by any means, including electronic recording, as long as a reasonably accurate and complete written transcription of the proceedings can be made.
- H. Presentation of Evidence While technical rules of evidence do not apply to expulsion hearings, evidence may be admitted and used as proof only if it is the kind of evidence on which reasonable persons can rely in the conduct of serious affairs. A recommendation by the Administrative Panel to expel must be supported by substantial evidence that the student committed an expellable offense. Findings of fact shall be based solely on the evidence at the hearing. While hearsay evidence is admissible, no decision to expel shall be based solely on hearsay, and sworn declarations may be admitted as testimony from witnesses of whom the Board or Administrative Panel determines that disclosure of their identity or testimony at the hearing may subject them to an unreasonable risk of physical or psychological harm. If, due to a written request by the accused pupil, the hearing is held at a public meeting, and the charge is committing or attempting to commit a sexual assault or committing a sexual battery as defined in Education Code Section 48900, a complaining witness shall have the right to have his or her testimony heard in a session closed to the public. The decision of the Administrative Panel shall be in the form of written findings of fact and a written recommendation to the Board of Directors, which will make a final determination regarding the expulsion. The final decision by the Board of Directors shall be made within ten (10) school days following the conclusion of the hearing. The decision of the Board of Directors is final. If the Administrative Panel decides not to recommend expulsion, the pupil shall immediately be returned to his/her educational program.
- I. Written Notice to Expel The Superintendent or designee, following a decision of the Board of Directors to expel, shall send written notice of the decision to expel, including the Board of Directors' adopted findings of fact, to the student or parent/guardian. This notice shall also include the following: (a) Notice of the specific offense committed by the student; and (b) Notice of the student's or parent/guardian's obligation to inform any new

district in which the student seeks to enroll of the student's status with the Charter School. The Superintendent or designee shall send a copy of the written notice of the decision to expel to the authorizer. This notice shall include the following: (a) The student's name; and (b) The specific expellable offense committed by the student.

- J. Disciplinary Records Heartwood Charter School shall maintain records of all student suspensions and expulsions at the Charter School. Such records shall be made available to the authorizer upon request.
- K. No Right to Appeal The pupil shall have no right of appeal from expulsion from Heartwood Charter School as the Heartwood Charter School Board of Directors' decision to expel shall be final.
- L. Expelled Pupils/Alternative Education Parents/guardians of pupils who are expelled shall be responsible for seeking alternative education programs including, but not limited to, programs within the County or their school district of residence. Heartwood Charter School shall work cooperatively with parents/guardians as requested by parents/guardians or by the school district of residence to assist with locating alternative placements during expulsion.
- M. Rehabilitation Plans students who are expelled from Heartwood Charter School shall be given a rehabilitation plan upon expulsion as developed by the Board of Directors at the time of the expulsion order, which may include, but is not limited to, periodic review as well as assessment at the time of review for readmission. The rehabilitation plan should include a date not later than one year from the date of expulsion when the pupil may reapply to Heartwood Charter School for admission.
- N. Readmission The decision to readmit a pupil or to admit a previously expelled pupil from another school district or charter school shall be in the sole discretion of the Board of Directors following a meeting with the Superintendent or designee and the pupil and parent/guardian or representative to determine whether the pupil has successfully completed the rehabilitation plan and to determine whether the pupil poses a threat to others or will be disruptive to the school environment. The Superintendent or designee shall make a recommendation to the Board of Directors following the meeting regarding his or her determination. The Board shall then make a final decision regarding readmission during the closed session of a public meeting, reporting out any action taken during closed session consistent with the requirements of the Brown Act. The pupil's readmission is also contingent upon the Heartwood Charter School' capacity at the time the student seeks readmission.
- O. Special Procedures for the Consideration of Suspension and Expulsion of Students with Disabilities
 - a. Notification of SELPA: Heartwood Charter School shall immediately notify the SELPA and coordinate the procedures in this policy with the SELPA of the discipline of any student with a disability or student that Heartwood Charter School or the SELPA would be deemed to have knowledge that the student had a disability.
 - b. Services During Suspension Students suspended for more than ten (10) school days in a school year shall continue to receive services so as to enable the student to continue to participate in the general education curriculum, although in

another setting (which could constitute a change of placement and the student's IEP would reflect this change), and to progress toward meeting the goals set out in the child's IEP/504 Plan; and receive, as appropriate, a functional behavioral assessment and behavioral intervention services and modifications, that are designed to address the behavior violation so that it does not recur. These services may be provided in an interim alternative educational setting.

- c. Procedural Safeguards/Manifestation Determination Within ten (10) school days of a recommendation for expulsion or any decision to change the placement of a child with a disability because of a violation of a code of student conduct, Heartwood Charter School, the parent/guardian, and relevant members of the IEP/504 Team shall review all relevant information in the student's file, including the child's IEP/504 Plan, any teacher observations, and any relevant information provided by the parents to determine:
 - i. If the conduct in question was caused by, or had a direct and substantial relationship to, the child's disability; or
 - ii. If the conduct in question was the direct result of the local educational agency's failure to implement the IEP/504 Plan.

If Heartwood Charter School, the parent/guardian, and relevant members of the IEP/504 Team determine that either of the above is applicable for the child, the conduct shall be determined to be a manifestation of the child's disability.

If Heartwood Charter School, the parent/guardian, and relevant members of the IEP/504 Team make the determination that the conduct was a manifestation of the child's disability, the IEP/504 Team shall:

- a. Conduct a functional behavioral assessment and implement a behavioral intervention plan for such child, provided that the Charter School had not conducted such assessment prior to such determination before the behavior that resulted in a change in placement;
- b. If a behavioral intervention plan has been developed, review the behavioral intervention plan if the child already has such a behavioral intervention plan, and modify it, as necessary, to address the behavior;
- and c. Return the child to the placement from which the child was removed, unless the parent/guardian and Heartwood Charter School agree to a change of placement as part of the modification of the behavioral intervention plan. If Heartwood Charter School, the parent/guardian, and relevant members of the IEP/504 Team determine that the behavior was not a manifestation of the student's disability and that the conduct in question was not a direct result of the failure to implement the IEP/504 Plan, then Heartwood Charter School may apply the relevant disciplinary procedures to children with disabilities in the same manner and for the same duration as the procedures would be applied to students without disabilities.

- d. Due Process Appeals The parent/guardian of a child with a disability who disagrees with any decision regarding placement, or the manifestation

determination, or Heartwood Charter School believes that maintaining the current placement of the child is substantially likely to result in injury to the child or to others, may request an expedited administrative hearing through the Special Education Unit of the Office of Administrative Hearings or by utilizing the dispute provisions of the 504 Policy and Procedures. When an appeal relating to the placement of the student or the manifestation determination has been requested by either the parent/guardian or Heartwood Charter School, the student shall remain in the interim alternative educational setting pending the decision of the hearing officer in accordance with state and federal law, including 20 U.S.C. Section 1415(k), until the expiration of the fortyfive (45) day time period provided for in an interim alternative educational setting, unless the parent/guardian and Heartwood Charter School agree otherwise. In accordance with 20 U.S.C. Section 1415(k)(3), if a parent/guardian disagrees with any decision regarding placement, or the manifestation determination, or if the Charter School believes that maintaining the current placement of the child is substantially likely to result in injury to the child or to others, the parent/guardian or Charter School may request a hearing. In such an appeal, a hearing officer may: (1) return a child with a disability to the placement from which the child was removed; or (2) order a change in placement of a child with a disability to an appropriate interim alternative educational setting for not more than 45 school days if the hearing officer determines that maintaining the current placement of such child is substantially likely to result in injury to the child or to others.

- e. Special Circumstances Heartwood Charter School personnel may consider any unique circumstances on a case-by-case basis when determining whether to order a change in placement for a child with a disability who violates a code of student conduct. The Superintendent or designee may remove a student to an interim alternative educational setting for not more than forty-five (45) school days without regard to whether the behavior is determined to be a manifestation of the student's disability in cases where a student:
 - i. Carries or possesses a weapon, as defined in 18 U.S.C. Section 930, to or at school, on school premises, or to or at a school function;
 - ii. Knowingly possesses or uses illegal drugs, or sells or solicits the sale of a controlled substance, while at school, on school premises, or at a school function; or
 - iii. Has inflicted serious bodily injury, as defined by 20 U.S.C. Section 1415(k)(7)(D), upon a person while at school, on school premises, or at a school function.
- f. Interim Alternative Educational Setting: The student's interim alternative educational setting shall be determined by the student's IEP/504 Team.
- g. Procedures for Students Not Yet Eligible for Special Education Services A student who has not been identified as an individual with disabilities pursuant to IDEA and who has violated Heartwood Charter School' disciplinary procedures may assert the procedural safeguards granted under this administrative

regulation only if Heartwood Charter School had knowledge that the student was disabled before the behavior occurred.

Heartwood Charter School shall be deemed to have knowledge that the student had a disability if one of the following conditions exists:

1. the parent/guardian has expressed concern in writing, or orally if the parent/guardian does not know how to write or has a disability that prevents a written statement, to Heartwood Charter School supervisory or administrative personnel, or to one of the child's teachers, that the student is in need of special education or related services.
2. The parent/guardian has requested an evaluation of the child.
3. The child's teacher, or other Heartwood Charter School personnel, has expressed specific concerns about a pattern of behavior demonstrated by the child, directly to the director of special education or to other Heartwood Charter School supervisory personnel.

If Heartwood Charter School knew or should have known the student had a disability under any of the three (3) circumstances described above, the student may assert any of the protections available to IDEA-eligible children with disabilities, including the right to stay-put.

If Heartwood Charter School had no basis for knowledge of the student's disability, it shall proceed with the proposed discipline. Heartwood Charter School shall conduct an expedited evaluation if requested by the parent/guardian; however, the student shall remain in the education placement determined by Heartwood Charter School pending the results of the evaluation. Heartwood Charter School shall not be deemed to have knowledge that the student had a disability if the parent/guardian has not allowed an evaluation, refused services, or if the student has been evaluated and determined to not be eligible.

Notification of Dangerous Pupils

Heartwood Charter School desires to provide a safe, orderly working environment for all employees. The school shall ensure that employees are informed, in accordance with law, regarding crimes and offenses by students who may pose a danger in the classroom. Pursuant to Welfare & Institution Code section 827(b) and Education Code section 48267, a criminal court will notify school administration when a student has engaged in certain criminal conduct. This information is forwarded to the Executive Director, who is

responsible for prompt notification of the student's teachers, other administrators, and the student's counselor. This information must be kept confidential and may not be disseminated by any employee receiving such a notification to any other person.

Additionally, all teachers will be provided with a list of students in their classes who have one or more suspensions of a serious or violent nature in the current year or in the previous three years. This information will be provided at the beginning of the year or semester or whenever new students are enrolled or added to a class. Teachers will be advised that such information is confidential and not to be further disseminated.

Anti-Discrimination/Anti-Harassment Policy and Hate Crime Reporting

Harassment, Intimidation, Discrimination & Bullying Policy

Title IX, Harassment, Intimidation, Discrimination & Bullying Policy

Discrimination, sexual harassment, harassment, intimidation, and bullying are all disruptive behaviors, which interfere with students' ability to learn and negatively affect student engagement, diminish school safety, and contribute to a hostile school environment. As such, Compass Charter Schools prohibits any acts of discrimination, sexual harassment, harassment, intimidation, and bullying altogether. This policy is inclusive of instances that occur on any area of the school campus, at school-sponsored events and activities, regardless of location, through school-owned technology, and through other electronic means.

As used in this policy, discrimination, sexual harassment, harassment, intimidation, and bullying are described as the intentional conduct, including verbal, physical, written communication or cyberbullying, including cyber sexual bullying, based on the actual or perceived characteristics of mental or physical disability, sex (including pregnancy and related conditions, and parental status), gender, gender identity, gender expression, nationality (including national origin, country of origin, and citizenship), race or ethnicity (including ancestry, color, ethnic group identification, ethnic background, and traits historically associated with race, including, but not limited to, hair texture and protective hairstyles such as braids, locks, and twist), immigration, religion (including agnosticism and atheism), religious affiliation, sexual orientation, childbirth or related medical conditions, marital status, genetic information, age, or association with a person or group with one or more of these actual or perceived characteristics or based on any other characteristic protected under applicable federal or state or local ordinance. Hereafter, such actions are referred to as "misconduct prohibited by this Policy."

To the extent possible, Heartwood Charter School will make reasonable efforts to prevent students from being discriminated against, harassed, intimidated, and/or bullied, and will take action to investigate, respond, address and report on such behaviors in a timely manner. Heartwood Charter School school staff that witness acts of misconduct prohibited by this Policy will take immediate steps to intervene when safe to do so.

Moreover, Heartwood Charter School will not condone or tolerate misconduct prohibited by this Policy by any employee, independent contractor or other person with which Heartwood Charter School does business, or any other individual, student, or volunteer. This Policy applies to all employees, students, or volunteer actions and relationships, regardless of position or gender. Heartwood Charter School will promptly and thoroughly investigate and respond to any complaint of misconduct prohibited by this Policy in a manner that is not deliberately indifferent and will take appropriate corrective action, if warranted. Heartwood Charter School complies with all applicable state and federal laws and regulations and local ordinances in its investigation of and response to reports of misconduct prohibited by this Policy.

Title IX, Harassment, Intimidation, Discrimination and Bullying Coordinator (“Coordinator”):
Tamara Lemesh
Vice Principal
170 Liberty School Road
Petaluma, Ca 94592
tamara.l@HeartwoodCharterSchool.org

Hate Crime Reporting Procedures and Policies

Students and staff are encouraged to report all incidents wherein they feel they have been the victim of or witnessed an incident regarding hate crime, bullying, etc. Heartwood Charter utilizes an internal online communication and monitoring platform. Policies that address hate violence include the Harassment, Intimidation, Discrimination, and Bullying policy and the UCP, which can both be included in the appendices. Found in Suspension and Expulsion Policy

School Dress Code

Any clothing, signs, attire, or paraphernalia which are identified by site administration as being “gang related” or which cause rival gangs to be openly hostile to each other or create an atmosphere of intimidation on campus may be forbidden. Students are prohibited from wearing gang-related apparel, carrying gang paraphernalia, or making gestures that symbolize gang membership when there is evidence of a gang presence that disrupts or threatens to disrupt the school’s activities.

Safe Ingress/Egress Procedures

Classroom and School Volunteer, Visitation, and Removal Policy

Bothin Onsite Volunteers

Before an individual can volunteer onsite, please make sure you have completed the following items:

1. Email bothin@heartwoodcharterschool.org and the Bothin teacher with your request to volunteer. Please include the following information:
 - Full Name
 - Contact Phone Number
 - Class or grade you will be volunteering in
 - Relationship to the student in the class(es) listed above
2. The Bothin Admin team will let you know that your request to volunteer is being processed and the following items are needed before coming to campus
 - Copy of your Drivers License
 - Copy of vehicle insurance
 - Driver Authorization must be completed and provided to the Office Staff at the Bothin campus
 - Clear TB results- for more information on the Marin County Health and Human Services TB requirements view this webpage. They also provide several days and time throughout the week for FREE TB tests and results
 - Completed Livescan form with receipt

No more than \$55 will be reimbursed to the person who will be volunteering on campus. If you are seeking reimbursement. [Make a copy of this form](#) (please do not use the original) and email it back to bothin@heartwoodcharterschool.org

While Heartwood Charter School encourages parents/guardians and interested members of the community to visit the charter school and view the educational program. Nevertheless, to ensure the safety of students and staff as well as to minimize interruption of the instructional program, the school has established the following procedures, to facilitate volunteering and visitations during regular school days:

Volunteering

Parents or guardians who are interested in volunteering in the classroom must adhere to the following guidelines:

1. Volunteers who will volunteer outside of the direct supervision of a credentialed employee shall be (1) fingerprinted and (2) receive background clearance prior to volunteering without the direct supervision of a credentialed employee.
2. A volunteer shall also have on file with the school office a certificate showing that, upon initial volunteer assignment, the person submitted to a tuberculosis risk assessment and, if tuberculosis risk factors were identified, was examined and found to be free of infectious tuberculosis. If no risk factors are identified, an examination is not required. At the discretion of the Board of Directors, this paragraph shall not apply to a volunteer whose functions do not require frequent or prolonged contact with pupils.
3. Volunteering must be arranged with the classroom teacher and Executive Director or designee, at least forty-eight (48) hours in advance.
4. Except for special circumstances, approved by the Executive Director, a volunteer may not volunteer in the classroom for more than three (3) hours per month.
5. Prior to volunteering in the classroom, the volunteer should communicate with the teacher to discuss the expectations for volunteering needs. Classroom volunteers are there to benefit the entire class and are not in class solely for the benefit of their own child. Classroom volunteers must follow the instructions provided by the classroom teacher or aide. Classroom rules also apply to volunteers to ensure minimal distraction to the teacher. If a volunteer is uncomfortable following the direction of the teacher or aid the volunteer may leave their volunteer position for that day.
6. Information gained by volunteers regarding students (e.g. academic performance or behavior) is to be maintained in strict confidentiality.
7. Volunteers shall follow and be governed by all other guidelines indicated elsewhere in this Policy. This includes, but is not limited to, the process of registering and signing out of the campus at the main office as indicated below.
8. This Policy does not authorize the school to permit a parent/guardian to volunteer or visit the campus if doing so conflicts with a valid restraining order, protective order, or order for custody or visitation issued by a court of competent jurisdiction.

Visitation

1. Visits during school hours should first be arranged with the teacher and Executive Director or designee, at least forty-eight (48) hours in advance. If a conference is desired, an appointment should be set with the teacher during non-instructional time, at least forty-Executive Director or designee.
2. All visitors shall sign in at the office and complete a Visitor's Permit in the main office immediately upon entering any school building or grounds during regular school hours. When registering, the visitor is required to provide his/her name, address, age (if under 21), his/her purpose for entering school grounds, and proof of identity.
3. If the visitor is a government officer/official (including but not limited to local law enforcement officers, social workers, district attorneys, or U.S. attorneys) the officer/official will also be asked to produce any documentation that authorizes school access. Heartwood Charter School shall make reasonable efforts to notify

parents or guardians prior to permitting a student to be interviewed or searched, consistent with the law and/or any court order, warrant or instructions from the officer/official. A copy of the documentation provided by the officer and notes from the encounter may be maintained by the school consistent with the law. The Governing Board and Bureau of Children's Justice in the California Department of Justice, at BCJ@doj.ca.gov, will be timely informed regarding any attempt by a law-enforcement officer to access a school site or a student for immigration-enforcement purposes, as recommended by the Attorney General.

4. For purposes of school safety and security, the Executive Director or designee may design a visible means of identification for visitors while on school premises.
5. Except for unusual circumstances, approved by the Executive Director, visits should not exceed approximately sixty (60) minutes in length and may not occur more than twice per semester.
6. While on campus, visitors are to enter and leave classrooms as quietly as possible, not converse with any student, teacher, or other instructional assistant unless permitted, and not interfere with any school activity. No electronic listening or recording device may be used in a classroom without the teacher's and Executive Director's written permission.
7. Before leaving campus, the visitor shall return the Visitor's Permit and sign out of the Visitors Log Book in the main office.
8. The Executive Director, or designee, may refuse to register a visitor or volunteer if it is believed that the presence of the visitor or volunteer would cause a threat of disruption or physical injury to teachers, other employees, or students.
9. The Executive Director or designee may withdraw consent to be on campus even if the visitor has a right to be on campus whenever there is reason to believe that the person has willfully disrupted or is likely to disrupt the school's orderly operation. If consent is withdrawn by someone other than the Executive Director, the Executive Director may reinstate consent for the visitor if the Executive Director believes that the person's presence will not constitute a disruption or substantial and material threat to the school's orderly operation. Consent can be withdrawn for up to fourteen (14) days.
10. The Executive Director or designee may request that a visitor who has failed to register, or whose registration privileges have been denied or withdrawn, promptly leave school grounds. When a visitor is directed to leave, the Executive Director or designee shall inform the visitor that if he/she reenters the school without following the posted requirements he/she will be guilty of a misdemeanor.
11. Any visitor that is denied registration or has their registration revoked may request a hearing. The request shall be in writing, shall state why the denial or revocation was improper, shall give the address to which notice of conference is to be sent, and shall be delivered to the Executive Director within fourteen (14) days of the denial or revocation of consent. The Executive Director shall promptly mail a written notice of the date, time, and place of the hearing to the person who requested the conference. A hearing with shall be held within seven (7) days after the Executive Director receives the request. If no resolution can be agreed upon, the Executive Director shall forward notice of the complaint to the Board of

Directors. The Board of Directors shall address the Complaint at the next regular board meeting and make a final determination.

12. At each entrance to the campus, signs shall be posted specifying the hours during which registration is required, stating where the office of the Executive Director or designee is located, and what route to take to that office, and setting forth the penalties for violation of this policy.
13. The Executive Director or designee shall seek the assistance of the police in managing or reporting any visitor in violation of this Policy.

Penalties

1. Pursuant to the California Penal Code, if a visitor does not leave after being asked or if the visitor returns without following the posted requirements after being directed to leave, he/she will be guilty of a crime as specified which is punishable by a fine of up to \$500.00 (five hundred dollars) or imprisonment in the County jail for a period of up to six (6) months or both.
2. Under California Education Code section 44811, disruption by a parent, guardian or other person at a school or school sponsored activity is punishable, upon the first conviction by a fine or no less than \$500.00 (five hundred dollars) and no more than \$1,000.00 (one thousand dollars) or by imprisonment in a County jail for no more than one (1) year, or both the fine and imprisonment.
3. Disruptive conduct may lead to pursuit of a restraining order against a visitor, which, if granted, would prohibit them from coming onto school grounds or attending school activities for any purpose for a period of up to three (3) years.

Drop-off And Pick-up Procedure

Students are dropped off at three different locations:

Zone 1: Kindergarten area

Zone 2: Open space by the Dining Hall

Zone 3: Middle School Campus

Parents are asked to drop off students and walk them to designated areas where a teacher on duty watches them until the start of the school day. Students may be dropped off up to 15 minutes before the start of school.

Zone 2: Parents who want to only drop off students without getting out of the car must pull up to the drop off zone by the persimmon tree in order to keep the traffic flowing.

Zone 3: Middle school students can be dropped off directly at the flag pole or at the gravel lot to walk up to the waiting area.

TK/K-2nd Grade Start time 8:45 am

3rd-5th Grade Start time 8:30 am

6th-8th Grade Start time 8:15 am

All classes end early on Mondays and Fridays

TK/K- End time is 12:00 pm

1st-8th End time is 1:00 pm

Parents pick up students at the same designated drop off location.

If a child arrives late to school they must stop by the office for a tardy slip. If a child needs to be picked up early, the parent must call the office and email the teacher to alert them. Office staff will retrieve the student from class. Parents can pick up their child at the office.

Safe and Orderly Environment/Disciplinary Procedures

Heartwood Charter School maintains a safe and orderly learning environment by, among other things, enforcing its rules and procedures on student discipline as set forth in this safety plan and in the Student Handbook.

Heartwood Charter School students are required to adhere to the Student Code of Conduct, which is included in the Student Handbook.

Reporting of Dangerous, Violent, or Unlawful Activities

Heartwood Charter School takes its role in providing a safe and trusted learning environment very seriously. If any student, family member, or member of Heartwood Charter School's extended community learns of any dangerous, violent, or unlawful activity that they believe has occurred, is occurring, or may occur at the school or at or near any school-sponsored or school-related event or location, they are strongly encouraged to report that activity—anonously if necessary—to the Executive Director.

A report can be sent by a legible written note, by email, or by telephone to the following: Stephanie Felton-Priestner @ stephanie@heartwoodcharterschool.org. Reports should include place, time, the general nature of the activity being reported, whether any life-threatening activity or weapons are involved, and any other important details. Any report of activity that imminently threatens or involves an imminent potential loss of life should first be made to 9-1-1, immediately.

Heartwood Charter School shall promptly review every report received as soon as possible, shall make a record of every report received, and shall make a reasonable inquiry into each, as necessary, to ensure to the greatest reasonable extent that no dangerous, violent, or unlawful act occurs at any school-related or school-sponsored event, or on school-provided transportation to any such event. The investigatory response taken by the school and actions taken will be logged as well.

Life Threatening Medical Emergency Procedures

Medical emergencies and accidents can occur at any time and may involve a student or employee. Some emergencies may only require first aid care, while others may require immediate medical attention.

1. Medical emergencies involving students or employees must be reported to the School Principal or designee.
2. Dial 911 or direct someone to do so, provide the following information:
 1. School name and phone number
 2. Building address including nearest cross street(s)
 3. Exact location within the building
 4. Your name and phone number
 5. Nature of the emergency
3. Do not hang up until advised to do so by dispatcher
4. Send a runner to notify the school office that an individual has been injured and an ambulance has been called.
5. Ask someone to dispatch a first aid/CPR trained employee to the victim.

6. If the victim is showing signs of cardiac arrest and is on a school site with an automatic external defibrillator (AED), procedures for retrieval and operation of the AED shall be followed and volunteers trained in the use of an AED shall be brought to the victim as soon as possible. If on a school site without an AED, proceed to call 911 immediately.
7. Stay calm. Keep the victim warm with a coat or blanket. Do not leave a person unattended.
8. Do not move the victim unless there is danger of further injury.
9. Do not give the victim anything to eat or drink.
10. Draft a written incident report and submit it to the School Principal, or his/her designee, before the end of the next workday. Whenever 911 is called, an incident report must be created within 24 hrs.

Response to Apparent Opioid Overdose

STEP 1: Evaluate for Signs of Overdose.

- a. All employees will be trained to recognize the following signs of an opioid overdose:
 - Unconsciousness or inability to awaken;
 - Slow or shallow breathing or breathing difficulty, such as choking sounds or a gurgling/snoring noise from a person who cannot be awakened; and
 - Fingernails or lips turning blue/purple.
- b. If any person is suspected of suffering an overdose, any employee shall first attempt to stimulate the person by:
 - Calling the person's name;
 - Then, vigorously grinding knuckles into the sternum (breastbone) or rub knuckles on the person's upper lip.
- c. If the person responds, assess whether he or she can maintain responsiveness and breathing.
- d. Continue to monitor the person, including breathing and alertness, and try to keep the person awake and alert.
- e. If unresponsive, call 911, consider providing rescue breathing if the person is not breathing on their own or get help from someone trained in emergency response techniques, and administer one dose of naloxone or get help from someone trained and comfortable administering a naloxone product.

STEP 2: Call 9-1-1. Calling 9-1-1 at the appropriate time is an essential step to getting someone with medical expertise to care for the person suspected of experiencing an opioid overdose. If no emergency medical services (EMS) or other trained personnel are on campus, activate the 9-1-1 emergency system immediately. All that needs to be reported is "Someone is unresponsive and not breathing" and then report the specific

address and/or description of the location on the campus where the person is located. After relaying this information, follow the dispatcher's instructions. If appropriate, the 9-1-1 operator will instruct you to begin CPR and implement rescue breathing, which you may perform or have another responsible and/or trained adult perform. Follow these and all instructions given by 911 operators until emergency responders arrive.

STEP 3: Administering Naloxone. Employees will be trained on the administration of naloxone according to the instructions provided with the naloxone product maintained at the school.

- a. If a person does not respond within 2-3 minutes after administering a dose of naloxone administer a second dose of naloxone.
- b. The duration of effect of naloxone depends on the dose, method of administration, and overdose symptoms. The goal of naloxone therapy should be to restore adequate spontaneous breathing, but not necessarily complete arousal.
- c. More than one dose of naloxone may be needed to revive someone who is overdosing. People who have taken longer acting or more potent opioids may require additional doses or forms of naloxone therapy.
- d. Comfort the person being treated, as withdrawal triggered by naloxone can feel unpleasant. Some people may become agitated or confused, which may improve by providing reassurance and explaining what is happening.

STEP 4: Support the Person's Breathing. Supporting breathing is an important intervention and may be lifesaving on its own. Rescue breathing can be very effective in supporting respiration, and chest compressions can provide ventilatory support. If trained to perform rescue breathing and comfortable doing so, it is recommended that you administer it to someone experiencing opioid overdose symptoms if they are having difficulty breathing. If you are not trained in rescue breathing or are not comfortable administering rescue breathing, call for help from school medical personnel, if any, or other individuals who may be trained in rescue breathing or other emergency medical response techniques.

- a. Rescue breathing for adults involves the following steps:
 - Be sure the person's airway is clear (check that nothing inside the person's mouth or throat is blocking the airway).
 - Place one hand on the person's chin, tilt the head back, and pinch the nose closed.
 - Place your mouth over the person's mouth to make a seal and give two slow breaths.
 - Watch for the person's chest (but not the stomach) to rise.
 - Follow up with one breath every 5 seconds.
- b. Chest compressions for adults involve the following steps:
 - Place the person on his or her back.
 - Press hard and fast on the center of the chest.
 - Keep your arms extended.

STEP 5: Monitor the Person's Response. All should be monitored for recurrence of signs and symptoms of opioid toxicity for at least 4 hours from the last dose of naloxone or discontinuation of naloxone infusion. Most people respond to naloxone by returning to spontaneous breathing within 2-3 minutes of receiving a dose of naloxone. Because naloxone has a relatively short duration of effect, overdose symptoms may return, so it is essential to get the person to an emergency department or other source of medical care as quickly as possible, even if the person revives after the initial dose of naloxone and seems to feel better.

DO's and DON'T's:

DO attend to the person's breathing and cardiovascular support needs by administering oxygen or performing rescue breathing and/or chest compressions.

DO administer naloxone and utilize a second dose if no response to the first dose.

DO put the person in the "recovery position" on the side, if you must leave the person unattended for any reason.

DO stay with the person and keep them warm.

DON'T slap or forcefully try to stimulate the person; it will only cause further injury. If you cannot wake the person by shouting, rubbing your knuckles on the sternum, or light pinching, the person may be unconscious.

DON'T put the person into a cold bath or shower. This increases the risk of falling, drowning, or going into shock.

DON'T try to make the person vomit drugs that may have been swallowed. Choking or inhaling vomit into lungs can cause a fatal injury.

NOTE: all naloxone products have an expiration date, so it is important to check the expiration date and obtain replacement naloxone as needed.

Heartwood Charter School

Board Policy Safety Manual, Injury and Illness Prevention

2/12/2026 **Proposed**



HEARTWOOD
CHARTER SCHOOL

SAFETY MANUAL
&
INJURY AND ILLNESS PREVENTION PROGRAM

170 Liberty School Road, Petaluma, CA 94952 and
3125 Sir Francis Drake Blvd, Fairfax, CA 94930

Phone: (707) 981-6307

Website: www.heartwoodcharterschool.org

**ACKNOWLEDGMENT OF RECEIPT OF SAFETY MANUAL & INJURY
AND ILLNESS PREVENTION PROGRAM**

PLEASE READ THE EMPLOYEE SAFETY MANUAL & INJURY AND ILLNESS PREVENTION PROGRAM AND SUBMIT A SIGNED COPY OF THIS STATEMENT TO THE OFFICE MANAGER.

EMPLOYEE NAME: _____

This is to certify that I have received a copy of the Heartwood Charter School Safety Manual & Illness and Injury Prevention Program. I have read this document, understand it, and will comply with it while working for the School.

I understand that failure to abide by these rules may result in disciplinary action and possible termination of my employment with Heartwood Charter School.

I also understand that I am to report any injury to my Supervisor or Manager immediately and report all safety hazards.

I further understand that I have the following rights.

- I am not required to work in any area I feel is not safe.
- I am entitled to information on any hazardous material or chemical I am exposed to while working.
- I am entitled to see a copy of the Heartwood Charter School Safety Manual & Injury and Illness Prevention Program.
- I will not be discriminated against for reporting safety concerns.

Employee's Signature: _____ Date: _____

Please sign/date, tear out, and return to the Office Manager.

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Policy Statement on Safety

The safety and health of each HEARTWOOD CHARTER SCHOOL employee is of primary importance to us. We are committed to maintaining a safe and healthful working environment, and to achieve this goal, we have developed and implemented this comprehensive Safety Manual and Injury and Illness Prevention Program (“Manual”). This Manual is designed to prevent workplace accidents, injuries, and illnesses. A complete copy of the program is maintained at our office at HEARTWOOD CHARTER SCHOOL, 3125 SIR FRANCIS DRAKE BLVD, FAIRFAX, CA 94930 OR GOOGLE DRIVE HUMAN RESOURCES FOLDER. You may ask to review it at any time. You may also contact HEATHER DEYDEN, ASST DIRECTOR OF OPERATIONS at HEATHER@HEARTWOODCHARTERSCHOOL.ORG if you have any questions or concerns.

It is the intent of HEARTWOOD CHARTER SCHOOL to comply with all laws relating to occupational safety and health. Management will provide all necessary safeguards, programs, and equipment required to reduce the potential for accidents and injuries. To further increase workplace safety, we require the active participation and assistance of all employees. The policies and procedures contained in this Manual are mandatory. You should also be constantly aware of conditions in all work areas that can produce injuries or illness. No employee is required to work at a job that he or she knows is not safe. Never hesitate to inform your supervisor of any potentially hazardous situation or condition that is beyond your ability or authority to correct immediately. No employee will be discriminated against for reporting safety concerns to management.

It is the responsibility of each employee to support the company safety program and to perform in a manner that assures his or her own personal safety and the safety of others, including customers, visitors and other trades. To be successful in our endeavor, all employees on every level must adopt proper attitudes towards injury and illness prevention. We must also cooperate in all safety and health matters, not only between management and employees, but also between each employee and his or her respective coworkers. Only through such an effort can any safety program be successful. Our objective is a safety and health program that will reduce the total number of injuries and illnesses to an absolute minimum. Our ultimate goal is zero accidents.

HEATHER DEYDEN, ASST DIRECTOR OF OPERATIONS

Code of Safe Practices

General Safety Rules

1. All persons shall follow this Code of Safe Practices and render every possible aid to safe operations.
1. Failure to abide by the Code of Safe Practices may result in disciplinary action up to and including termination.
1. Employees are to immediately report any unsafe conditions, accidents, injuries or illness to their Supervisor or Manager, HEATHER DEYDEN, ASST DIRECTOR OF OPERATIONS OR TAMARA LEMESH, VICE PRINCIPAL, BOTHIN WALDORF PROGRAM.
1. If you are unsure of the safe method to do your job, STOP and ask your Supervisor. Ignorance is no excuse for a safety violation.
1. No one shall be knowingly permitted to work while the employee's ability or alertness is impaired by fatigue, illness, and prescription or over the counter drugs. Employees who are suspected of being under the influence of illegal or intoxicating substances, or impaired by fatigue or an illness, shall be prohibited from working.
1. Never work while fatigued, ill, or under the influence of an illegal or intoxicating substance.
1. Anyone known to be under the influence of any drugs or intoxicating substances which impair the employee's ability to safely perform the assigned duties shall not be allowed on the job.
1. Horseplay, scuffling, fighting and other acts that tend to have an adverse influence on workplace safety or employee well-being are prohibited.
1. Work shall be well-planned and supervised to prevent injuries in the handling of materials and in working together with equipment.
1. Keep the work area clean and free of debris, electrical cords and other hazards.
1. Immediately clean up spilled liquids.
1. Always notify all other individuals in your area who might be endangered by the work you are doing.
1. Do not operate equipment that you are not familiar with. Do not attempt to use such equipment until you are fully trained and authorized.
1. You are responsible for ensuring all safety guards are operable and in place. If they are not, STOP working and tell your Supervisor.

1. Never bring firearms, weapons, illegal drugs or alcoholic beverages on school grounds.
1. HEARTWOOD CHARTER SCHOOL will appropriately label equipment that is NOT to be operated, energized or used. All such notices and procedures must be observed and obeyed.
1. Do not block exits, fire doors, aisles, fire extinguishers, first aid kits, emergency equipment, electrical panels, or traffic lanes.
1. Do not leave tools, materials, or other objects on the floor that might cause others to trip and fall.
1. Do not run on the school site if it would be unsafe to do so.
1. Do not distract others while working. If conversation is necessary, make sure eye contact is made prior to communicating.
1. Employees shall not enter manholes, underground vaults, chambers, tanks, silos, or other similar places that receive little ventilation, unless it has been determined that it is safe to enter.
1. Employees shall ensure that all guards and other protective devices are in proper places and adjusted, and shall report deficiencies promptly to the Supervisor or Manager.
1. Materials, tools, or other objects shall not be thrown from buildings or structures until proper precautions are taken to protect others from the falling objects.
1. Employees shall cleanse thoroughly after handling hazardous substances, and follow special instructions from authorized sources.
1. Gasoline or other flammable liquids shall not be used for cleaning purposes.
1. No burning, welding, or other source of ignition shall be applied to any enclosed tank or vessel, even if there are some openings, until it has first been determined that no possibility of explosion exists, and authority for the work is obtained from the Supervisor or Manager.

Campus Safety

1. Be aware of unknown persons loitering in parking areas, walkways, entrances and exits and service areas.
2. Report any suspicious persons or activities to school administration.
3. Employee desk or office should be secured at the end of the day.
4. When an employee is called away from his or her work area for an extended length of time, valuable or personal articles should not be left around a work station that may be accessible.

5. Employees must immediately notify school administration when keys are missing or if security access codes or passes have been breached.

Fire Prevention and Housekeeping

1. Always take precautions to prevent fires which may be started, particularly from oily waste, rags, gasoline, flammable liquids, acetylene torches, improperly installed electrical equipment and trash.
1. Firefighting equipment is to be inspected on a regular basis. All discharged, damaged or missing equipment is to be immediately reported to a Supervisor. Tampering with fire equipment is prohibited.
1. Access to fire extinguishers must be kept clear at all times. Make note of the location of firefighting equipment in your work area.
1. Never use gasoline or flammable solvents for cleaning purposes.
1. Smoking is prohibited within twenty (20) feet of where flammable substances are present.
1. In case of fire, employees shall consider the safety of themselves and other individuals before saving property.
1. Keep your work areas free of debris. Remove useless material from the work area as fast as required to help reduce tripping hazards.
1. Maintain awareness of potential hazards when walking about the work site.
1. Keep tools, materials and equipment out of walkways and stairways at all times.
1. Sharp wires or protruding nails must be made safe.

General Duties and Responsibilities for Safety

A safe working environment can only be achieved and maintained when there is active interest, participation, and accountability at all levels of the organization. To ensure this, HEARTWOOD CHARTER SCHOOL delegates the following safety duties by job title. Please keep in mind that this is not an all-inclusive list. In some cases employees will need to perform safety duties outside their regular responsibilities to prevent accidents.

Executive management must plan, organize, and administer the program by establishing policy, setting goals and objectives, assigning responsibility, motivating subordinates, and monitoring results. The Office Manager will support and maintain an ongoing IIPP through the following:

1. Providing clear understanding and direction to all management and employees regarding the importance of safety through the development, implementation, monitoring and revision of policy and procedures.
2. Ensuring that adequate funds are budgeted for the purchase of necessary safety materials, safety equipment, proper personal protective equipment, adequate time for employee safety training, and maintenance of tools and equipment.
3. Overseeing development, implementation, and maintenance of the IIPP and other required safety programs.
4. Maintaining an organizational commitment to accident prevention by expecting safe conduct on the part of all managers, supervisors, and employees.
5. Holding all levels of management and employees accountable for accident prevention and safety.
6. Reviewing all accident investigations to determine corrective action.

Managers and Supervisors play a key role in the prevention of accidents on the job. They have direct contact with the employees and know the safety requirements for various jobs. Safety responsibilities for these individuals include:

1. Enforce all safety rules in the Manual and ensure safe work procedures.
2. Verify corrective action has been taken regarding safety hazards and accident investigations.
3. Conduct periodic documented inspections of the school sites to identify and correct unsafe actions and conditions that could cause accidents.
4. Act as a leader in school safety policy and setting a good example by following all safety rules.
5. Become familiar with local, state, and federal safety regulations.

6. Correct unsafe acts and conditions that could cause accidents.
7. Communicate with all employees about safety and accident prevention activities.
8. Correct the cause of any accident as soon as possible.
9. Ascertain that proper first aid and firefighting equipment is maintained and used when conditions warrant its use.
10. Maintain good housekeeping conditions at all times.
11. Investigate all injuries and accidents to determine their cause and potential corrective action.
12. Ascertain that all injuries involving our employees that require medical attention are properly treated and promptly reported to the office.

The Safety Coordinator acts as a safety resource for the company and is responsible for maintaining program records. The Office Manager is currently responsible for this role. The Safety Coordinator will also be our primary person to deal with outside agencies regarding the safety program and its contents. Additional duties include:

1. Coordinate all loss prevention activities as a representative of management.
2. Act as a consultant to management in the implementation and administration of the policies set forth in this Manual.
1. Develop and implement loss prevention policies and procedures designed to ensure compliance with the applicable rules and regulations of all federal, state, and local agencies.
1. Review all accident reports to determine cause and preventability.
1. Conduct periodic reviews of the program and job sites to evaluate performance, discuss problems and help solve them.
1. Consult with representatives of our insurance companies in order that their loss control services will support the Manual.
1. Review Workers' Compensation Claims and help supply the insurance carrier with information about injured employees in order to keep loss reserves as low as possible.

Every employee is responsible for working safely, both for self-protection and for protection of fellow workers. Employees must also support all company safety efforts. Specific employee safety responsibilities include:

1. If you are unsure how to do any task safely, ask your supervisor.

1. Read and abide by all requirements of this Manual.
1. Report all accidents and injuries, no matter how minor, to your supervisor immediately.
1. Report any safety hazards or defective equipment immediately to your supervisor.
1. Never possess, or be under the influence of, alcohol or controlled substances while on the premises.
1. Never engage in horseplay or fighting.
1. Participate in, and actively support, the safety program.

Office Safety

Office accidents can and do happen. To prevent them, HEARTWOOD CHARTER SCHOOL has developed the following rules for our office staff. We will also endeavor to include office employees in periodic safety meetings. If at any time you feel there is a safety hazard, or you have any safety concerns, please do not hesitate to notify the Office Manager.

1. Report all accidents and injuries, no matter how minor, to your Supervisor immediately.
2. Correct or report any safety hazards that you observe.
3. Clean up any spilled material that may present a slipping hazard.
4. Do not stretch any cords across aisles that may present a tripping hazard.
5. No one is allowed to climb on shelves or stand on chairs; you must use a step stool or ladder.
6. Keep all legs of the chair on the floor. Do not tilt chairs too far back.
7. No one shall be in the possession of, or under the influence of, alcohol or other intoxicating substances while on the premises.
8. No horseplay will be tolerated.
9. Close file drawers when not in use.
10. Do not open more than one file drawer at a time. This could cause the cabinet to tip.
11. Do not store heavy objects above your head that could fall on you in an earthquake.
12. Do not store flammable or combustible materials near heaters or other heat sources.
13. If you are unsure how to do any task safely, ask your supervisor.
14. Do not operate any equipment you are not trained and authorized to use.
15. Always follow safe lifting procedures when lifting any object and get help for heavy loads by doing the following:
 - Bend your knees, not your back.
 - Keep the load close to body.
 - Keep your back straight.
 - Lift with your legs.
 - Do not lift and twist.

Office Ergonomics

Studies have shown over the years that poorly designed and arranged work areas and repetitive motions can lead to a variety of injuries including carpal tunnel syndrome and tendonitis, which are often referred to as repetitive motion injuries (“RMI”). As with cancer, heart disease, and many other ailments, there are risk factors that increase an individual’s likelihood of developing RMI. If the risk factors are reduced, so are the chances of being injured. While some of these risk factors, such as family history, cannot be controlled in the employment setting, many can, including:

- The force used to perform a task;
- Posture while performing tasks;
- The number of repetitions performed in a given time period; and
- Mechanical stresses such as hard surfaces.

Proper Adjustments to Office Equipment

The most significant RMI risk factor in office environments is poor body posture caused by improper workstation design or layout. In many cases employees are required to work in awkward positions for long periods of time. This greatly increases the likelihood of injury. Fortunately, this is often the easiest problem to correct. The goal is to perform work in neutral posture as much as possible. Neutral posture is best described as the most comfortable position and usually involves little or no twisting or deviation of the joints.

Sedentary employees are encouraged to contact the Safety Coordinator to ensure that their workstations allow for neutral posture, with respect to the position of the employee’s chair, computer keyboard, desk, computer monitor, and work product.

Hazardous Materials and Chemicals Communication Program

It is the policy of HEARTWOOD CHARTER SCHOOL that the first consideration of work shall be the protection of the safety and health of all employees. We have developed this Hazard Communication Program to ensure that materials which have been prohibited from use at public schools are not used at our school sites, and to ensure that all employees receive adequate information about the possible hazards that may result from the various materials found in our facility or used in our operations. This Hazard Communication Program will be monitored by the Office Manager, who will be responsible for ensuring that all facets of the program are carried out, and that the program is effective.

The following are a few of the common materials regulated by the program:¹

- Asbestos-containing materials;
- Lead-containing materials;
- Pesticides, including antimicrobial sanitizers and disinfectants;
- Cleaning products and air purifiers; and
- Art supplies.

Hazardous Material Inventory

The Office Manager maintains a list of all hazardous materials used in our operations or present in our facility. This list contains the name of the product, the type of product (cleaner, disinfectant, solvent, adhesive etc.) and the name and address of the manufacturer. Any toxic chemicals that are prohibited from use at a public school shall be removed from the inventory. Examples of such chemicals are certain pesticides and art supplies.

Material Safety Data Sheets (“MSDS”)

Copies of MSDS for all hazardous substances to which our employees may be exposed will be kept in a binder in the office at 3125 SIR FRANCIS DRAKE BLVD, FAIRFAX. These MSDS are available to all employees, at any reasonable time, upon request. Copies of the most commonly used products will also be kept by the Supervisor at the work site.

The Office Manager will be responsible for reviewing incoming MSDS for new and significant health/safety information. They will ensure that any new information is passed on to the affected employees.

The Office Manager will also review all incoming MSDS for completeness. If an MSDS is missing or obviously incomplete, a new MSDS will be requested from the manufacturer. The California Occupational Safety and Health Administration (“Cal/OSHA”) will be notified if a complete MSDS is not received and the manufacturer will not supply one.

¹ Please note that the following items are not included in the program: foods, drugs, cosmetics or tobacco; untreated wood products; hazardous waste; and certain consumer products packaged for sale to and use by the general public, provided that our exposure is not significantly greater than typical consumer exposure.

New materials will not be introduced into the shop or field until a MSDS has been received. The purchasing department will make it an ongoing part of their function to obtain MSDS for all new materials when they are first ordered.

Container Labeling

All containers of hazardous substances must be correctly labeled and the label must be legible.

The label must contain:

- The chemical name of the contents;
- The appropriate hazard warnings; and
- The name and address of the manufacturer.

All secondary containers will be labeled as to their contents with a reference to the original label.

Employee Information and Training

All employees will be provided information and training on Integrated Pest Management in accordance with the Healthy Schools Act of 2000.

Hazardous Non-Routine Tasks

Infrequently, employees may be required to perform hazardous non-routine tasks. Prior to starting this work, each involved employee will be given information by his/her supervisor about hazards to which they may be exposed during such activity.

This information will include:

- The specific hazards;
- Protective/safety measures which must be utilized; and
- The measures the organization has taken to lessen the hazards, including special ventilation, respirators, the presence of another employee, emergency procedures, etc.

Informing Outside Contractors and Vendors

To ensure that outside contractors are not exposed to our hazardous materials, and to ensure the safety of the contractor's employees, it will be the responsibility of the Supervisor to provide outside contractors the following information:

- The hazardous substances under our control that they may be exposed to while at the work site; and
- The precautions the contractor's employees must take to lessen the possibility of exposure.

We will obtain from outside contractors and vendors the name of any hazardous substances the contractor's employees may be using at a work site or bringing into our facility. The contractor must also supply a copy of the material safety data sheet relevant to these materials.

Employee Rights Under the Hazard Communication Standard

At any reasonable time, an employee has the right, upon request, to:

- Access the MSDS folder, and the Hazard Communication Program;
- Receive a copy of any environmental sampling data collected in the workplace; and
- See his/her employment medical records.

Hazard Identification and Evaluation

The following procedures are to assist in the identification and correction of hazards. These procedures are representative only and are not exhaustive of all the measures and methods that will be implemented to guard against injury from recognized and potential hazards in the workplace. As new hazards are identified and improved work procedures developed, they will be promptly incorporated into our Safety Manual.

Loss Analysis

Periodic loss analyses will be conducted by the Office Manager. These will help identify areas of concern and potential job hazards. The results of these analyses will be communicated to management, supervision, and employees through safety meetings and other appropriate means.

Accident Investigations

All accidents and injuries will be investigated in accordance with the guidelines contained in this program. Accident investigations will focus on all causal factors and corrective action including the identification and correction of hazards that may have contributed to the accident.

Employee Suggestions

Employees are encouraged to report any hazard they observe to their supervisor. No employee of HEARTWOOD CHARTER SCHOOL will ever be disciplined or discharged for reporting any workplace hazard or unsafe condition in good faith. However, employees who do NOT report potential hazards or unsafe conditions that they are aware of will be subject to disciplinary action.

Regulatory Requirements

All industries are subject to government regulations relating to safety. Many of these regulations are specific to our type of business. Copies of pertinent regulations can be obtained from the Office Manager.

Outside Agencies

Several organizations may assist us in identifying hazards in our workplace. These include safety officers from other contractors, insurance carrier safety and health consultants, private industry consultants, the fire department, and Cal/OSHA Consultation.

Periodic Safety Inspections

Periodic safety inspections ensure that physical and mechanical hazards are under control and identify situations that may become potentially hazardous. Inspections shall include a review of the work habits of employees in all work areas. These inspections will be conducted by the Office Manager or other designated individual.

Periodic safety inspections will be conducted:

- When new substances, process, procedures or equipment are used;
- When new or previously unrecognized hazards are identified; and
- Periodically by the Safety Coordinator.

Documentation of Inspections

Safety inspections will be documented to include the following:

- Date on which the inspection was performed;
- The name and title of person who performed the inspection;
- Any hazardous conditions noted or discovered and the steps or procedures taken to correct them; and
- Signature of the person who performed the inspection.

All reports shall be kept on file for a minimum of two (2) years.

Hazard Correction

The following procedures will be used to evaluate, prioritize and correct identified safety hazards. Hazards will be corrected in order of priority, with the most serious hazards being corrected first.

Hazard Evaluation

Factors that will be considered when evaluating hazards include:

- Potential severity (the potential for serious injury, illness or fatality);
- Likelihood of exposure (the probability of the employee coming into contact with the hazard);
- Frequency of exposure (how often employees come into contact with the hazard);
- Number of employees exposed;
- Possible corrective actions (what can be done to minimize or eliminate the hazard); and
- Time necessary to correct (the time necessary to minimize or eliminate the hazard).

Techniques for Correcting Hazards

1. **Engineering Controls:** Could include machine guarding, ventilation, noise reduction at the source, and provision of material handling equipment. These are the first and preferred methods of control.
2. **Administrative Controls:** The next most desirable method would include rotation of employees or limiting exposure time.
3. **Personal Protective Equipment:** Includes hard hats, hearing protection, respirators and safety glasses. These are often the least effective controls for hazards and should be relied upon only when other controls are impractical.

Documentation of Corrective Action

All corrective action taken to mitigate hazards should be documented. Depending on the circumstances, one of the following forms should be used:

- Safety Contact Report;
- Safety Meeting Report;
- Memorandum or letter; or
- Safety inspection form.

All hazards noted on safety inspections will be rechecked on each subsequent inspection and notations made as to their status.

Bloodborne Pathogen Exposure Control Plan

The Office Manager, or designee, shall meet state and federal standards for dealing with bloodborne pathogens and other potentially infectious materials in the workplace. The Office Manager, or designee, shall establish a written “Exposure Control Plan” designed to protect employees from possible infection due to contact with bloodborne viruses, including human immunodeficiency virus (HIV) and hepatitis B virus (HBV).

The Board shall determine which employees have occupational exposure to bloodborne pathogens and other potentially infectious materials. In accordance with the Charter School’s “Exposure Control Plan,” employees having occupational exposure shall be trained in accordance with applicable state regulations (8 CCR 5193) and offered hepatitis B vaccination.

The Office Manager, or designee, may exempt designated first-aid providers from pre-exposure hepatitis B vaccination under the conditions specified by state regulations.

Any employee not identified as having occupational exposure in the Charter School’s exposure determination may petition to be included in the Charter School’s employee in-service training and hepatitis B vaccination program. Any such petition should be submitted to the Office Manager, or designee, who shall evaluate the request and notify the petitioners of his/her decision. The Office Manager, or designee, may deny a request when there is no reasonable anticipation of contact with infectious material.

Safety Communication

This section establishes procedures designed to develop and maintain employee involvement and interest in the Safety Manual and IIPP. These activities will also ensure effective communication between management and employees on safety related issues that is of prime importance to HEARTWOOD CHARTER SCHOOL.

The following are some of the safety communication methods that may be used:

1. Periodic safety meetings with employees that encourage participation and open, two-way communication.
1. New employee safety orientation and provision of the Code of Safe Practices.
1. Provision and maintenance of employee bulletin boards discussing safety issues, accidents, and general safety suggestions.
1. Written communications from management or the Safety Coordinator, including memos, postings, payroll stuffers, and newsletters.
1. Anonymous safety suggestion program.

Employees will be kept advised of highlights and changes relating to the safety program. Management shall relay changes and improvements regarding the safety program to employees, as appropriate. Employees will be involved in future developments and safety activities, by requesting their opinions and comments, as necessary.

All employee-initiated safety related suggestions shall be properly answered, either verbally or in writing, by the appropriate level of management. Unresolved issues shall be relayed to the Office Manager.

All employees are encouraged to bring any safety concerns they may have to the attention of management. HEARTWOOD CHARTER SCHOOL will not discriminate against any employee for raising safety issues or concerns.

HEARTWOOD CHARTER SCHOOL also has a system of anonymous notification whereby employees who wish to inform the company of workplace hazards without identifying themselves may do so by phoning or sending written notification to the following address:

ATTN: TAMARA LEMESH
HEARTWOOD CHARTER SCHOOL
3125 SIR FRANCIS DRAKE BLVD, FAIRFAX, CA 94930
Phone: 415-328-1020
TAMARA.L@heartwoodcharterschool.org

Employee Safety Training

HEARTWOOD CHARTER SCHOOL is committed to instructing all employees in safe and healthful work practices. Awareness of potential hazards, as well as knowledge of how to control them, is critical to maintaining a safe and healthful work environment and preventing injuries. To achieve this goal, we will provide training to each employee on general safety issues and safety procedures specific to that employee's work assignment.

Such training provides the following benefits:

- Makes employees aware of job hazards;
- Teaches employees to perform jobs safely;
- Promotes two (2) way communication;
- Encourages safety suggestions;
- Creates interest in the safety program; and
- Fulfills Cal/OSHA requirements.

Every new employee will be given instruction by his/her Supervisor in the general safety requirements of their job. A copy of our Code of Safe Practices shall also be provided to each employee.

Managers, Supervisors, and employees will be trained at least twice per year on various accident prevention topics.

Employee training will be provided at the following times:

1. All new employees will receive a safety orientation their first day on the job.
1. All new employees will be given a copy of this Manual (which includes our Code of Safe Practices) and will be required to read and sign for it.
1. All employees given a new job assignment for which training has not been previously provided will be trained before beginning the new assignment.
1. Whenever new substances, processes, procedures or equipment that represent a new hazard are introduced into the workplace.
1. Whenever HEARTWOOD CHARTER SCHOOL is made aware of a new or previously unrecognized hazard.
1. Whenever management believes that additional training is necessary.
1. After all serious accidents.
1. When employees are not following safe work rules or procedures.

Training topics will include, but not be limited to:

- Employee's safety responsibility;
- General safety rules;
- Code of Safe Practices;
- Safe job procedures;
- Ergonomics;
- Use of safety equipment;
- Emergency procedures;
- Safe lifting and material handling practices; and
- Contents of safety program
- COVID-19 Prevention procedures

The following training method should be used:

- **Tell them** how to do the job safely;
- **Show them** how to do the job safely;
- **Have them tell you** how to do the job safely;
- **Have them show you** how to do the job safely; and
- **Follow up** to ensure they are still performing the job safely.

Actual demonstrations of the proper way to perform a task are very helpful in most cases.

Emergency Medical Services and First Aid

HEARTWOOD CHARTER SCHOOL will ensure the availability of emergency medical services for its employees at all times. We will also ensure the availability of a suitable number of appropriately trained persons to render first aid. The Office Manager will maintain a list of trained individuals and take steps to provide training for those that desire it.

First-Aid Kits

Every work site shall have access to at least one first-aid kit in a weatherproof container. The first-aid kit will be inspected regularly to ensure that it is well stocked, in sanitary condition, and any used items are promptly replaced. The contents of the first-aid kit shall be arranged to be quickly found and remain sanitary. First-aid dressings shall be sterile and in individually sealed packages.

At a minimum, the following first-aid supplies shall be kept for each classroom backpack:

Backpack	1
Flashlight	1
Batteries	2
Pair of scissors	1
First Aid instruction summary sheet	1
Pad of paper (for name tags, etc.)	1
Pen	1
Pencil	1
Light stick	1
Whistle	1
Sewing kit	1
Package of safety pins	1 packag e
Package of plastic trash bags	6 packag es
Package of small paper bags	2 packag es
Package of paper cups	2 packag es

Package of pre-moistened towelettes	1 packag e
Bottle of hydrogen peroxide	1
Small package of Tylenol	2 packag es
Package of Tums	1 packag e
Ziploc sandwich bags	2
Box of Telfa pads	1
Box of Band-Aids	1
Cold packs	2
Roll of adhesive tape	1
Pair of disposable gloves	10
Box of toilet tissue	1

**To be readily available but not necessarily within the first-aid kit.*

Drugs, antiseptics, eye irrigation solutions, inhalants, medicines, or proprietary preparations shall not be included in HEARTWOOD CHARTER SCHOOL first-aid kits unless specifically approved, in writing, by an employer-authorized, licensed physician. Other supplies and equipment, if provided, shall be in accordance with the documented recommendations of an employer-authorized licensed physician upon consideration of the extent and type of emergency care to be given based upon the anticipated incidence and nature of injuries and illnesses and availability of transportation to medical care.

First Aid

The designated first aid person on each site will be available at all times to render appropriate first aid for injuries and illnesses. Proper equipment for the prompt transportation of the injured or ill person to a physician or hospital where emergency care is provided, or an effective communication system for contacting hospitals or other emergency medical facilities, physicians, ambulance and fire services, shall also be furnished. The telephone numbers of the following emergency services in the area shall be posted near the job telephone, or otherwise made available to the employees where no job site telephone exists:

1. A company authorized physician or medical clinic, and at least one alternate if available;
1. Hospitals;
1. Ambulance services; and
1. Fire-protection services.

Prior to the commencement of work at any site, the Supervisor or Manager shall locate the nearest preferred medical facility and establish that transportation or communication methods are available in the event of an employee injury.

Each employee shall be informed of the procedures to follow in case of injury or illness through our new employee orientation program, Code of Safe Practices, and safety meetings.

Where the eyes or body of any person may be exposed to injurious or corrosive materials, suitable facilities for drenching the body or flushing the eyes with clean water shall be conspicuously and readily accessible.

Accident Procedures

These procedures are to be followed in the event of an employee injury in the course of employment.

1. **For severe accidents call 911 and request the Paramedics.**
1. **Employees must report all work-related injuries to their Supervisor immediately, even if they do not feel that it requires medical attention.** Failure to do so may delay Workers' Compensation benefits, and the employee may face disciplinary action.
1. The Supervisor, employee, and first aid person should determine whether or not outside medical attention is needed. When uncertainty exists on the part of any individual, the employee should be sent for professional medical care.
1. If medical attention is not desired or the employee refuses treatment, you must still fill out a HEARTWOOD CHARTER SCHOOL Accident Report in case complications arise later.
1. In all cases, if the employee cannot transport himself or herself for any reason, transportation should be provided.
1. In the event of a serious accident involving hospitalization for more than twenty-four (24) hours, amputation, permanent disfigurement, loss of consciousness or death, phone contact should be made with the office at 415-328-1020. Contact must also be made with the nearest Cal/OSHA office within eight (8) hours.

Accident Investigation

The Supervisor, Manager, or other designated individual will investigate all work-related accidents in a timely manner. This includes minor incidents and “near accidents,” as well as serious injuries. An accident is defined as any unexpected occurrence that results in injury to personnel, damage to equipment, facilities, or material, or interruption of normal operations.

Responsibility for Accident Investigation

Immediately upon being notified of an accident, the Supervisor, Manager, or other designated individual shall conduct an investigation. The purpose of the investigation is to determine the cause of the accident and corrective action to prevent future reoccurrence, not to fix blame or find fault. An unbiased approach is necessary in order to obtain objective findings.

The Purpose of Accident Investigations

- To prevent or decrease the likelihood of similar accidents.
- To identify and correct unsafe work practices and physical hazards. Accidents are often caused by a combination of these two factors.
- To identify training needs. This makes training more effective by focusing on factors that are most likely to cause accidents.

What Types of Incidents Do We Investigate?

- Fatalities
- Serious injuries
- Minor injuries
- Property damage
- Near misses

Procedures for Investigation of Accidents

Immediately upon being notified of an accident the Supervisor, Manager, or other designated individual will:

1. Visit the accident scene, as soon as possible, while facts and evidence are still fresh and before witnesses forget important details and to make sure hazardous conditions to which other employees or customers could be exposed are corrected or have been removed.
1. Provide for needed first aid or medical services for the injured employee(s).
1. If possible, interview the injured worker at the scene of the accident and verbally “walk” him or her through a re-enactment. All interviews should be conducted as privately as possible. Interview all witnesses individually and talk with anyone who has knowledge of the accident, even if they did not actually witness it.

1. Report the accident to the office at : 415-328-1020. Accidents will be reported by the office to the insurance carrier within twenty-four (24) hours. All serious accidents will be reported to the carrier as soon as possible.
1. Consider taking signed statements in cases where facts are unclear or there is an element of controversy.
1. Thoroughly investigate the accident to identify all accident causes and contributing factors. Document details graphically. Use sketches, diagrams and photos as needed. Take measurements when appropriate.
1. All accidents involving death, disfigurement, amputation, loss of consciousness or hospitalization for more than twenty-four (24) hours must be reported to Cal/OSHA immediately.
1. Focus on causes and hazards. Develop an analysis of what happened, how it happened, and how it could have been prevented. Determine what caused the accident itself, not just the injury.
1. Every investigation must also include an action plan that includes an assessment of how such accidents be prevented in the future.
1. In the event a third party or defective product contributed to the accident, save any evidence as it could be critical to the recovery of claim costs.

Accurate & Prompt Investigations

- Ensures information is available
- Causes can be quickly corrected
- Helps identify all contributing factors
- Reflects management concern
- Reduces chance of recurrence

Investigation Tips

- Avoid placing blame
- Document with photos and diagrams, if needed
- Be objective, get the facts
- Reconstruct the event
- Use open-ended questions

Questions to Ask

When investigating accidents, asking open-ended questions beginning with “who,” “what,” “when,” “where,” “why,” and “how” will provide more information than closed-ended questions such as, “Were you wearing gloves?”

Examples include:

- How did it happen?
- Why did it happen?
- How could it have been prevented?
- Who was involved?
- Who witnessed the incident?
- Where were the witnesses at the time of the incident?
- What was the injured worker doing?
- What was the employee working on?
- When did it happen?
- When was the accident reported?
- Where did it happen?
- Why was the employee assigned to do the job?

The single, most important question that must be answered as the result of any investigation is: “What do you recommend be done (or have you done) to prevent this type of incident from recurring?”

Once the Accident Investigation is Completed

- Take or recommend corrective action.
- Document corrective action.
- Management and the Safety Coordinator will review the results of all investigations.
- Consider safety program modifications.
- Information obtained through accident investigations can be used to update and improve our current program.

Enforcement of Safety Policies

The compliance of all employees with HEARTWOOD CHARTER SCHOOL's Safety Manual and IIPP is mandatory and shall be considered a condition of employment.

Training Programs

The importance of safe work practices and the consequences of failing to abide by safety rules will be covered in the New Employee Safety Orientation and safety meetings. This will help ensure that all employees understand and abide by HEARTWOOD CHARTER SCHOOL safety policies.

Retraining

Employees that are observed performing unsafe acts or not following proper procedures or rules will be retrained by their supervisor. A Safety Contact Report may be completed by the supervisor to document the training. If multiple employees are involved, additional safety meetings will be held.

Disciplinary Action

The failure of an employee to adhere to safety policies and procedures established by HEARTWOOD CHARTER SCHOOL can have a serious impact on everyone concerned. An unsafe act can threaten not only the health and wellbeing of the employee committing the unsafe act but can also affect the safety of his/her coworkers and customers. Accordingly, any employee who violates any of the organization's safety policies will be subject to disciplinary action.

Note: Failure to promptly report any on-the-job accident or injury, on the same day as its occurrence, is considered a serious violation of the organization's safety policies. Any employee who fails to immediately report a work-related accident or injury, no matter how minor, shall be subject to disciplinary action.

Employees will be disciplined for infractions of safety rules and unsafe work practices that are observed, not just those that result in an injury. Often, when an injury occurs, the accident investigation will reveal that the injury was caused because the employee violated an established safety rule and/or safe work practice(s). In any disciplinary action, the supervisor should be cautious that discipline is given to the employee for safety violations, and not simply because the employee was injured on the job or filed a Workers' Compensation claim.

Violations of safety rules and the Code of Safe Practices are to be considered equal to violations of other company policy. Discipline for safety violations will be administered in a manner that is consistent with HEARTWOOD CHARTER SCHOOL's Employee Handbook.

APPENDIX A

Vaccination Declination Form

EMPLOYEE NAME: _____

By signing below, I acknowledge the following:

I understand that due to my occupational exposure to blood or other potential infectious materials I may be at risk of acquiring Hepatitis B Virus (“HBV”) infection. I have been given the opportunity to be vaccinated with Hepatitis B vaccine, at no charge to myself. However, I decline the Hepatitis B vaccination at this time. I understand that by declining this vaccine, I continue to be at risk of acquiring Hepatitis B, a serious disease. If in the future, I continue to have occupational exposure to blood or other potentially infectious materials and I want to be vaccinated with Hepatitis B vaccine, I can receive the vaccination series at no charge to me.

SIGNATURE: _____

DATE: _____

Heartwood School

Local Control and Accountability Plan

Mid-Year Update

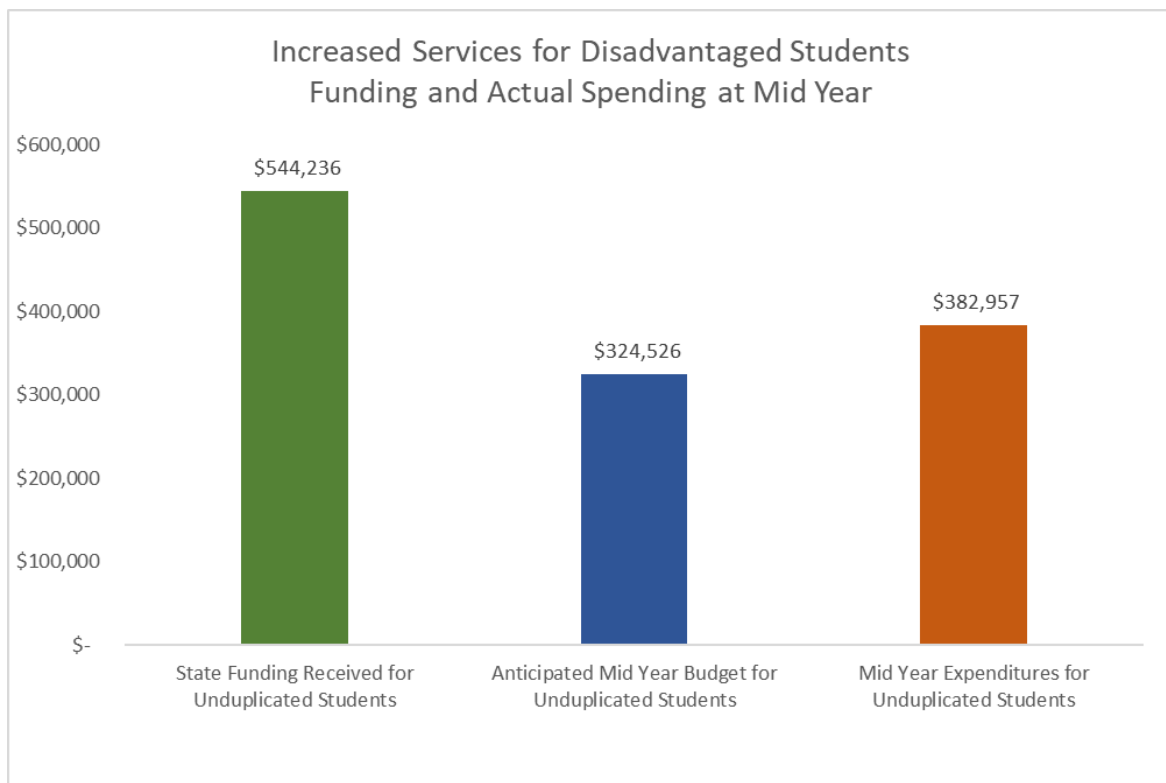
February 10, 2026

The Local Control and Accountability Plan (LCAP) defines how moneys received for the School's disadvantaged students, defined as economically disadvantaged, English learners and foster youth.

The Department of Education has requested that schools report spending progress at mid-school year on the actions planned to support this population. Since the actual spending was measured as of January 31, 2026, this will serve as the LCAP Mid-Year update. The intent is that the schools demonstrate that the funds are being used as the year progresses, and the received funds are not left underspent at year end.

At mid-year the actual spending should be 50% of the anticipated spending for the year in order to be on track. The graphic below compares the annual State Funding Received amount with the Anticipated Mid Year Budget (50% of Annual Budgeted Amount), as well as the actual Mid-Year Expenditures.

It can be seen that the actual Mid-Year Expenditures are greater than the Anticipated Mid Year Budget, and will likely meet or exceed the goal of spending the received funds in this school year.



Heartwood Charter School

Board Budget Report

February 24, 2026

Budget Forecast for 2025-26 School Year

For 2025-26 enrollment figures remain steady, but some drop-off is seen. Enrollment remains mostly steady and above the level of the Adopted Budget approved last June, with slight declines from peaks in both programs. Updated enrollment forecasts will be used for the Second Interim Budget, allowing for possible seasonal declines in the Homeschool Program. Also, while strong, Bothin enrollment saw declines across the elementary grades.

This indicates that the revenue forecast is expected to be slightly higher than that proposed in the Annual Budget.

The suppressed prior year (2024-25) P-2 funding level will reduce cashflow somewhat until April 2026. As explained in previous reports, the delayed work sample collection for last year’s P-2 report resulted in reduced funding for the first half of 2025-26, but will catch up thereafter.

Several expense areas are showing significant cost overage in the current year. A number of budget items are continuing to show upward pressure. Forecast values are estimated.

Expense	Budgeted	Forecast at Yearend
Rent	\$243,288	\$271,800
Food	\$60,000	\$98,000
Furnishings	\$10,000	\$31,400
Legal	\$63,000	\$85,000
Insurance	\$87,000	\$109,000
Dues and Memberships	\$4,000	\$14,000
Janitorial	\$38,000	\$60,860
Teaching Assistants	\$75,932	\$99,000
Enrichment	\$346,762	\$376,955
Special Ed Contractors	\$1,000,000	\$1,200,000

So far, we are forecasting a balanced budget for 2025-26. Higher expenses are still expected to fall within revenues, aided by unfilled staff positions. Suppressed revenue is still expected to recover by yearend, though an event in the California economy or financial markets could affect that outcome.

Special Education contract costs continue to be elevated in January 2026. While special education costs tend to fully materialize later in February or March, costs to date are showing to be significantly

higher than last year at this time. Cost containment efforts have begun, but will likely not appear in the cost reports until April. The contract costs are still offset by **continued open positions in Sped staffing**.

Cost containment efforts include hiring one education specialist to defer contracted services, as well as possible training of staff to avoid contracting behavioral aides. It is still too early to tell if the overruns can be resolved, or if we are facing a structural cost problem.

Reallocation from other budget categories may be required.

Careful cost management must be employed in order to achieve a balanced budget at yearend.