

**MARCUM-ILLINOIS UNION SCHOOL DISTRICT  
REGULAR BOARD MEETING  
AGENDA**

**Monday, February 14, 2022  
6:00 pm Open Session  
Library**

**2452 El Centro Blvd.  
East Nicolaus, CA 95659**

Meeting facilities are accessible to persons with disabilities. Anyone who is planning to attend the board meeting and is visually or hearing impaired or has any disability that needs special assistance should call the Superintendent/Principal at the District Office at least 48 hours in advance of the meeting to make arrangements. Public comments submitted by email to [maggiei@sutter.k12.ca.us](mailto:maggiei@sutter.k12.ca.us) by 3:00pm on the date of the Board Meeting will be read to the Board during the meeting.

**1. CALL TO ORDER, PLEDGE OF ALLEGIANCE**

**2. ROLL CALL**

Jeff Moore, President  
Jill Bramhill, Clerk  
Alan Menigoz  
Keith Turner  
Josh Wanner

<b>Present</b>	<b>Absent</b>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**3. APPROVAL OF THE AGENDA**

Occasionally an item requiring attention will arrive in the office after the agenda is posted. Items may be added to the agenda with 2/3-majority approval of the board. Items to be added will be made available to the public at the meeting.

\_\_\_\_\_  
\_\_\_\_\_  
Motion \_\_\_\_\_ Second \_\_\_\_\_ Vote \_\_\_\_\_

**4. WILDCAT CONTRIBUTOR AWARD- ARRA LEWIS**

**5. SOUTH SUTTER CHARTER SCHOOL**

Cynthia Rachel will present the monthly report for South Sutter Charter School.

**6. STUDENT COUNCIL PRESIDENT’S REPORT**

**7. SUPERINTENDENT’S REPORT**

**8. CONSENT AGENDA**

Any item on the Consent Agenda may be considered separately at the request of a board member.

**8.1 Approval of Minutes: January 10, 2022**

**8.2 Approval of Monthly Warrants: 5491, 5531, 5566, 5579, 5624, 5668**

**8.3 Williams Act: 0 Complaints**

**8.4 Enrollment Report:**

*Marcum-Illinois Elementary School Enrollment\**

TK	K	First	Second	Third	Fourth	Fifth	Sixth	Seventh	Eighth	Total
6	17	20	20	22	22	22	19	18	16	182

*Marcum-Illinois Preschool Enrollment\**

**Full Time 16**

**Part Time 7**

*\*As of 2/7/22*

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Motion \_\_\_\_\_ Second \_\_\_\_\_ Vote \_\_\_\_\_

**9. ITEMS PULLED FROM THE CONSENT AGENDA FOR DISCUSSION**

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Motion \_\_\_\_\_ Second \_\_\_\_\_ Vote \_\_\_\_\_

**10. INFORMATION ITEMS**

**10.1 LCAP Mid Year Update**

*The district is required to update the Board on the progress within the LCAP (Local Control Accountability Plan) so far this year. Included in the update is Mid-Year LCAP Update, the Budget Overview for Parents Update, and the LCAP Supplement. This update will also be posted on our website for educational partners to access.*

**10.2 Covid-19 Prevention Program (CPP)**

*All California employers are required to have a site-specific COVID-19 Prevention Program (CPP) that includes safety procedures to reduce the risk of exposure for employees to an identified pandemic.*

**10.3 700 Forms**

*Every elected official and public employee who makes or influences governmental decisions is required to submit a Statement of Economic Interest, also known as the Form 700. The Form 700 provides transparency and ensures accountability.*

**11. ACTION ITEMS**

**11.1. Safe Return to In-Person Instruction and Continuity of Services Plan (“Reopening Plan”)**

*The district is expected to review and update this plan every 6 months. The Board reviewed the plan as an information item last month. The plan was sent to all parents for review and they were given the opportunity to provide feedback; it was shared with Site Council as well and they were given an opportunity to provide feedback there too. Feedback will be shared with the Board prior to the vote.*

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Motion \_\_\_\_\_ Second \_\_\_\_\_ Vote \_\_\_\_\_

**11.2. Comprehensive School Safety Plan**

*All California public schools, kindergarten and grades one through twelve, must develop a comprehensive school safety plan, per California Education Code sections 32280-32289.5. This plan has been reviewed and recommended by the Marcum-Illinois School Site Council.*

\_\_\_\_\_  
\_\_\_\_\_  
Motion \_\_\_\_\_ Second \_\_\_\_\_ Vote \_\_\_\_\_

**11.3 Reduction in Force Resolution- Instructional Aide/Paraprofessional  
BR 2021-2022-6**

*Due to uncertainties related to enrollment for 2022-2023, it is recommended that the district approve a Board Resolution for Reduction in Force of 2 Instructional Aides/Paraprofessionals for the 2022-2023 school year.*

\_\_\_\_\_  
\_\_\_\_\_  
Motion \_\_\_\_\_ Second \_\_\_\_\_ Vote \_\_\_\_\_

**11.4 Reduction in Force Resolution- Certificated Elementary Teacher  
BR 2021-2022-7**

*Due to uncertainties related to enrollment for 2022-2023, it is recommended that the district approve a Board Resolution for Reduction in Force of 2 Certificated Elementary Teachers for the 2022-2023 school year.*

\_\_\_\_\_  
\_\_\_\_\_  
Motion \_\_\_\_\_ Second \_\_\_\_\_ Vote \_\_\_\_\_

**12. COMMENTS FROM THE PUBLIC**

“No action or discussion shall be undertaken on any item not appearing on the posted agenda except the Members of the Board or the Marcum-Illinois Union Elementary School District Staff may briefly respond to statements made or questions posed. As the Board discusses agenda items, audience participation is permitted. The president will recognize those members of the audience who wish to speak. If necessary, each person wishing to speak will be asked to identify himself prior to speaking. Individual speakers shall be allowed three minutes to address the Board on each agenda or non-agenda item. The president shall limit the total time for public input on each item to 20 minutes. With Board consent, the president may increase or decrease the time allowed for public presentation, depending on the topic and the number of persons wishing to be heard. Generally, the president will ask board members for their remarks prior to recognizing requests to speak from the audience. At the president’s discretion, agenda items may be considered in other than numerical order.” Board Policy (Bylaws) 9323

**13. HOUSE CHALLENGE**

**14. NEXT BOARD MEETING**

- **March 14, 2022**

**15. CLOSED SESSION**

- *Government Code Section 54957.6*  
*Conference with labor negotiator*  
*Name of negotiator: Maggie Irby*  
*Unrepresented employees: Certificated Employees/Classified Employees*
- *Government Code 54957 – Public Employee Discipline/Dismissal/Release/Complaint*
- *Board Workshop with Debbie Pearson*

**16. REPORT OUT FROM CLOSED SESSION**

\_\_\_\_\_  
\_\_\_\_\_  
Motion \_\_\_\_\_ Second \_\_\_\_\_ Vote \_\_\_\_\_

**17. ADJOURNMENT**





**South Sutter Charter School and  
 Marcum-Illinois Union Elementary School District  
 Monthly Report to Authorizer- February 2022**

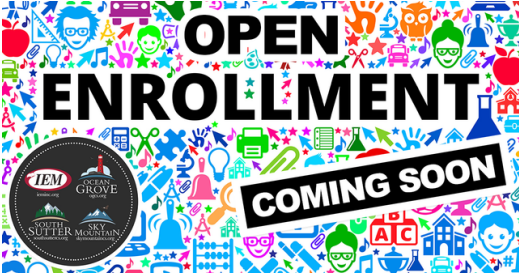
**Month End Enrollment Information: January 30, 2022**

Total Active Enrollment: 2467      Prospective Students: 100

<b>K</b>	247	<b>7</b>	193		<b>Butte</b>	190
<b>1</b>	198	<b>8</b>	198		<b>Colusa</b>	21
<b>2</b>	217	<b>9</b>	170		<b>Placer</b>	648
<b>3</b>	204	<b>10</b>	171		<b>Sacramento</b>	1218
<b>4</b>	214	<b>11</b>	158		<b>Sutter</b>	99
<b>5</b>	185	<b>12</b>	122		<b>Yolo</b>	142
<b>6</b>	190				<b>Yuba</b>	149

**The total enrollment number, enrollment by grade, and enrollment by the county do not include the prospective student count.**

**Enrollment trends/comments**



Open Enrollment will be from 2/21-3/11 and we will hold the lottery on 3/18.  
 Information regarding Open Enrollment can be found on our enrollment page of the school website - <https://southsuttercs.org/iemschools/enroll>.

**Federal/State Reporting and LCAP**

Our SARC was posted to our school website by the February 1st deadline. Our mid-year LCAP will be reviewed by our governing board during their February meeting, to be in compliance with state reporting timelines. At our February board meeting, we will also review our annual

update to our school safety plan and approve our Title IX policy. Now that mid-year LCAP reporting is complete, we are turning our attention to the regular LCAP cycle. In the first week of February, we sent out our annual LCAP educational partner survey which forms the basis of our feedback in decision making for any changes to our LCAP for next year.

### CAASPP Updates

We used ESSER II funding to provide online CAASPP test preparation classes for our students. Students have the opportunity to sign up for a 6 week test prep class including live synchronous instruction in either math or ELA, depending on the student's greatest area of need. Parents have expressed great interest in doing this since it has been three years since we last had CAASPP and for many of our students this is their first time doing the test.

As of this writing we are still waiting on test procedure instructions from the state to conduct the CAASPP remotely. We have had to postpone our teacher training but are doing our best to prepare our technology to test remotely.

### Educational Program Updates



Parents, please join us as we help you navigate the upcoming assessments for the remainder of this school year. Our assessment team will present parents with the necessary and most current information, and will answer questions.



In this webinar we will walk through the FAFSA page by page and explain how to complete it. You can do it along with us and probably be done by the end of the webinar.



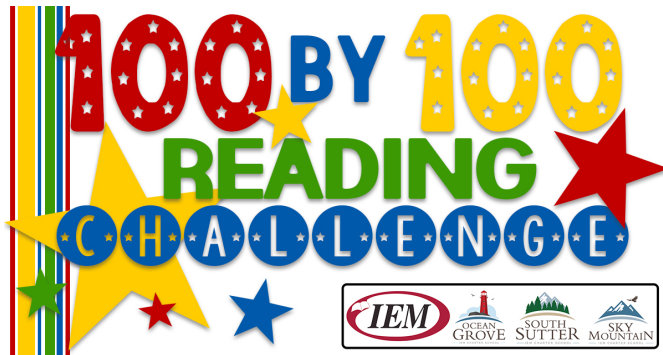
Please join us as we discuss the High School Academy and the options for the 22/23 school year. We will have experts on hand to present and answer questions including one of our academy ESs. This webinar is designed for families of current 8th and 9th graders who may be interested in the High School Academy for the 22/23 school year.

## Upcoming Engagement Opportunities



This program uses the resources of several institutions to tell the story of the boat Gerda III, a Danish lighthouse tender that played a critical role in carrying Jews to safety in Sweden during October of 1943. Students will experience survivor accounts, oral histories, and behind the scenes footage on the vessel. Specific connections to the book *Number the Stars* can be made for classes that are reading that book. This program is a partnership between The Museum of Jewish Heritage: A Living Memorial to the Holocaust, the Holocaust Center of Pittsburgh, and Mystic Seaport Museum.

## Social Media



Welcome to the 2021-22 100 by 100 Reading Challenge!

**WHAT:** Join us for a 100 books or chapters by the 100th day of school reading challenge! Students who complete the challenge will receive a certificate and a small prize and be entered to win a gift of school swag! **WHO:** Our 100 by 100 Reading Challenge is open to all current TK-12

OGCS, SMCS, and SSCS students. **WHEN:** The 100 by 100 Reading Challenge ends on the 100th day of school, Wednesday, February 2nd, 2022 (2/2/22). The submission form will be open until Friday, February 4th, 2022. **HOW:** Students can read (or be read) any genre of picture books or chapter books. Record the books read on the attached Book List. Students who read chapter books or longer non-fiction titles should use the attached Chapter Book Record Sheet to mark to 100. Students reading picture books should use the attached Book Record Sheet to mark to 100. Print pages as needed from this packet. Once a student has completed the 100 chapters or books please take a picture of the record sheets all together in one photo. Only 1 file/photo will be accepted per student/per submission. Please submit at your school's 100 by 100 challenge webpage by 2/4/22. Students can submit more than once! Every 100 books is an entry into the drawing for school swag.

**MARCUM-ILLINOIS UNION SCHOOL DISTRICT  
REGULAR BOARD MEETING**

**AGENDA  
Monday, January 10, 2022**

**1. CALL TO ORDER, PLEDGE OF ALLEGIANCE**

*Called to order at 6:01*

**2. ROLL CALL**

*BOARD MEMBERS PRESENT: Jeff Moore, Jill Bramhill, Keith Turner, Josh Wanner*

*BOARD MEMBERS ABSENT: Alan Menigoz*

**3. APPROVAL OF THE AGENDA**

Occasionally an item requiring attention will arrive in the office after the agenda is posted. Items may be added to the agenda with 2/3-majority approval of the board. Items to be added will be made available to the public at the meeting.

*Jeff Moore motioned to approve the agenda with the addition of item 5A: Student Body Representative Report and moving the South Sutter Charter School report to follow the Superintendent's Report. Keith Turner seconded. Roll Call Vote 4-0.*

**SUPERINTENDENT'S REPORT**

5A: Student Body Report

*Mattias Vasquez, the student council president, shared that the student body is doing great this year, and that the student council members have been doing a good job with the video morning announcements.*

5B: Superintendent's Update

*Maggie Irby shared that we had a great first week back from winter break.*

*Since August, there have been 16 positive Covid-19 cases on campus, 5 staff and 11 students. Four of these cases have been within the last two weeks, and these four cases had a total of 38 identified close contacts. This is more than usual, as many of the cases were in preschool and the mixed middle school cohort. There has still been no on-campus transmission to close contacts. There were 18 individuals who were either positive or close contacts over winter break, but they were not on campus. We were able successfully communicate with these individuals and provide tests to them. Maggie sent reminders to the school community about expectations on campus and staying home when ill or in close contact, and out educational partners continue to communicate with us promptly and follow those expectations.*

*Our state funded Emergency Connectivity Fund grant for \$27,955 was approved. This grant will allow us to purchase 90 new Chromebooks and will cover the hot spot fees for the remainder of the school year. The Chromebooks and hot spots will support being prepared for distance learning and independent study as needed.*

*There is a state funded grant for kitchen infrastructure that will provide a minimum of \$25,000 for the purpose of equipping school kitchens to accommodate the number of meals being provided. Shasta Ford is working to identify how the funds could best be utilized for our campus kitchen.*

*The Board Resolution regarding the Marcum-Illinois School Board's request that the state recommend, rather than require, Covid-19 vaccination for students was sent to all pertinent government agencies and representatives. There has still been no update to this potential vaccine mandate since the governor first announced it in October of 2021.*

*The governor announced the proposed budget for next year. There appears to be an increase in funding for schools. It seems that there are not as many specific/restricted funds and most of the added funding is going to general LCFF funds. This will allow us more local control in deciding the best way to utilize the funds for our students. There is a 5.33% COLA estimated for next year.*

#### **4. SOUTH SUTTER CHARTER SCHOOL**

*Cynthia Rachel shared facility updates from Brandy and John. They expressed gratitude for Marcum's willingness to partner with the charter school to provide meals for the special education students meeting at the Learning Center in the mornings. South Sutter is also working with local law enforcement to explore options for Active Shooter training for the librarians on site at the Learning Center. The Learning Center is currently being used for math intervention groups, special education, and as a junior ROTC training location.*

*South Sutter Charter School's enrollment numbers are steady. The number of seniors will decrease as some students will graduate at the end of January. Open enrollment will begin in February and close in March. The hope is that holding the enrollment lottery earlier will generate more accurate numbers for hiring purposes. Virtual information sessions are also being offered every 2 weeks, with a daytime option added to ensure accessibility for all.*

*Planning is happening for the WASC visit in February. The representatives will visit the Learning Center and will also travel to see some student interactions with staff members. These visits will happen as much as Covid protocols and family comfort will allow.*

*Cynthia shared virtual club and engagement opportunities that are being offered both in person and online.*

*They are planning for in person graduation in May. The hope is to secure an outdoor facility so that the event can still take place regardless of potential changes to Covid guidelines.*

*Josh Wanner offered his support for coordinating active shooter training if the need arises.*

## 5. CONSENT AGENDA

Any item on the Consent Agenda may be considered separately at the request of a board member.

**6.1 Approval of Minutes: December 13, 2021**

**6.2 Approval of Monthly Warrants: 5396, 5417**

**6.3 Williams Act Quarterly Report (October-December): 0 Complaints**

**6.4 Enrollment Report:**

*Marcum-Illinois Elementary School Enrollment\**

TK	K	First	Second	Third	Fourth	Fifth	Sixth	Seventh	Eighth	Total
6	18	19	20	22	22	23	19	18	18	185

*Marcum-Illinois Preschool Enrollment\**

**Full Time 16**

**Part Time 7**

*\*As of 1/4/22*

*Josh Wanner motioned to approve all items in the consent agenda. Jill Bramhill seconded. Roll Call Vote 4-0.*

## 6. ITEMS PULLED FROM THE CONSENT AGENDA FOR DISCUSSION

*None.*

## 7. INFORMATION ITEMS

**8.1 Safe Return to In-Person Instruction and Continuity of Services Plan (“Reopening Plan”)**

*The District is expected to review and update this plan every 6 months. The Board is asked to review the plan as an information item this month, it will be brought back as an action item next month with any feedback from educational partners.*

*Maggie Irby explained the timeline for reviewing the document, ensuring there is enough time for the board and other educational partners to review it publicly. One change to the plan includes updated wording to represent that the school will follow the most recent guidelines, as they continue to update and change. Under board direction, we would also like to welcome volunteers back on campus if they are able to follow the same guidelines and protocols in addition to existing background check requirements (proof of vaccination or negative Covid-19 test result within 48 hours). The district would be able to provide testing for volunteers as needed.*

*Jeff Moore asked if any educational partners had expressed opposition to allowing volunteers on campus, and there has been no opposition to Maggie’s knowledge. Maggie added that welcoming volunteers would also benefit Parents Club in moving forward and helping with upcoming events like the Wildcat Run.*

*Maggie added that quarantine guidelines from the CDC have shifted, but the CDPH has not officially updated local guidance yet. The new CDC guidelines state that close contacts must still quarantine for 10 days, but isolation of a positive individual may be modified based on testing and symptoms.*

*Jeff Moore clarified that school masking guidance remains the same. CDPH reviewed their guidance for schools in November and no changes were made to the requirement for masking indoors on campus. A statewide mask mandate was also issued and extended through February that goes beyond the school setting.*

*Keith Turner presented the option of requiring campus volunteers to be vaccinated against Covid-19 but stated that his support would follow any relevant state guidance. Jill Bramhill presented the idea for volunteer testing to take place on campus the day that the volunteering will take place. Jill wants to have testing occur same day, on site at the district. (48 hours, if school doesn't have any it would allow parents time to test elsewhere).*

*Maggie will make edits to the volunteer section of the plan according to board input and post the draft online, allowing feedback from the public. Mrs. Brazil will also present the updated draft of the plan for feedback at the next School Site Council meeting.*

*Jeff Moore expressed his support and value of family and community input to help make these important decisions.*

## **8.2 2020-2021 School Accountability Report Card (SARC)**

*School Districts are required to post the School Accountability Report Card to their website and submit it CDE by February 1<sup>st</sup> each year. This year, CDE is late in providing data required in the SARC and is expected to provide appropriate data sometime in January. The information currently included is what we have to this point; we will add state provided data once it is provided and will post to the school website and submit it to CDE prior to February 1<sup>st</sup>.*

*Maggie Irby provided an overview of the contents of the SARC. Some information in the document comes from the state, and some she inputs directly. The state has delayed their update of the information, but it is expected to be released to fill in the remainder of the document sometime in January. It is not required for the SARC to come before the board – but Maggie values sharing the information with the Board.*

*Jeff questioned the number of N/A in the report. We took CAASP and did not need to use local assessments.*

## **9. ACTION ITEMS**

### **9.1. MIUSD Calendar for 2022-2023**

*MIUSD is asked to approve the calendar for the 2022-2023 school year.*

*The Board reviewed comments from the staff and compared the draft calendar to the approved calendar for East Nicolaus High School.*

*Jeff Moore motioned to modify the calendar draft to make 12/15/22 a full school day, 12/16/22 a minimum day, and 1/2/23 will be no school. Jill Bramhill seconded. Roll Call Vote 4-0.*

*Jeff Moore motioned to approve the revised 2022-2023 calendar. Keith Turner seconded. Roll Call vote 4-0.*

#### **10. COMMENTS FROM THE PUBLIC**

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*Emily Campouris expressed her concern for requiring volunteers to be tested the same day. Her concern is that the school may run into problems if a specific number of volunteers are needed/expected and are then unable to volunteer. She suggested volunteers be given 24 hours to test in advance so that if any test positive there is some notice to try to replace them. She also expressed that all volunteers should be required to test, regardless of vaccination status because many vaccinated individuals can still carry the Covid-19 virus.*

*Richele Gibson agreed with Emily that all volunteers should be tested, regardless of vaccination status.*

*Paula Villareal expressed her gratitude for all of the extra things that Maggie Irby and Courtney Brazil did throughout December that made the holiday season extra special for the students. The elves that visited from the North Pole brought much joy and excitement. They went above and beyond with extra additions to the holiday drive through to make it special for the students and families. Students have missed out on a lot because of the pandemic and resulting restrictions, and she wants the Board to know that our administrators are taking care of business and being amazing women. Jeff Moore added his appreciation of what Maggie and Courtney do all the time, not just in the holiday season. Tami Ortega added that in addition to being great administrators, they are also great moms.*

*Jeff Moore extended a special thanks to Ms. Campouris and Ms. Gibson for coming to provide input at tonight’s board meeting. The Board appreciates families taking the time to be heard at the meeting, as there have not been many attendees from the public recently.*

#### **11. NEXT BOARD MEETING**

- **February 14, 2022**

#### **12. CLOSED SESSION**



- *Government Code Section 54957.6*  
*Conference with labor negotiator*  
*Name of negotiator: Maggie Irby*  
*Unrepresented employees: Certificated Employees/Classified Employees*
- *Government Code 54957 – Public Employee Discipline/Dismissal/Release/Complaint*

**13. REPORT OUT FROM CLOSED SESSION**

*No report.*

**14. ADJOURNMENT**

Approval Batch 005491						Bank Account COUNTY - COUNTY				
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount
Direct Vendor		ALHAMBRA & SIERRA SPRINGS (009102/1) P.O. BOX 660579 DALLAS, TX 75266-0579								
2021/22	01/02/22		OFFICE/STAFF	15604920010222	01/04/22	Paid	Printed	163.80		163.80
			WATER 12/7 & 12/21	(810417)						
		2022 01-0000-0-5800-00-0000-2700-000-000-0000-00								
Check #	00563395					Check Date 01/06/22	PO#		Register # 000167	
<b>Total Invoice Amount</b>								<b>163.80</b>		
Direct Vendor		AT&T (003812/1) PO BOX 5025 CAROL STREAM, IL 60197-5025								
2021/22	12/07/21		21-22 FIBER	DP22-00083	01/04/22	Paid	Printed	1,053.04		1,053.04
			12/7-1/6	(810417)						
		2022 01-0000-0-5900-00-0000-2700-000-000-0000-00								
Check #	00563396					Check Date 01/06/22	PO#		Register # 000167	
2021/22	12/10/21		1249 12/10-1/9	DP22-00081	01/04/22	Paid	Printed	25.71		25.71
				(810417)						
		2022 01-0000-0-5900-00-0000-2700-000-000-0000-00								
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			FEE							
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Approval Batch 005491 (continued)										Bank Account COUNTY - COUNTY	
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<b>Total Invoice Amount</b>								<b>1,200.00</b>			
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<b>Total Invoice Amount</b>								<b>218.25</b>			
Direct Vendor		STAPLES ADVANTAGE DEPT LA (000322/1) P O BOX 83689 CHICAGO, IL 60696-3689									
2021/22	12/11/21		SS OFFICE TONER	3494984935 (810417)	01/04/22	Paid	Printed	382.11		382.11	
Check #	00563401	2022 01-0000-0-4300-00-0000-2700-000-000-0000-00				Check Date 01/06/22	PO#		Register # 000167		

Selection Sorted by Approval BatchId, Filtered by (Org = 17, Payment Method = N, Payment Type = N, On Hold? = Y, Approval Batch Id(s) = 005491,005531,005566,005579,005624,005668, Page Break by Check/Advice? = N, Zero? = Y)

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Approval Batch 005491 (continued)								Bank Account COUNTY - COUNTY		
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount
Direct Vendor		STAPLES ADVANTAGE DEPT LA (000322/1)			(continued)					
2021/22	12/11/21		SS OFFICE TONER	3494984936	01/04/22	Paid	Printed	140.96		140.96
				(810417)						
Check #	2022 01-0000-0-4300-00-0000-2700-000-000-0000-00	00563401				Check Date 01/06/22	PO#		Register # 000167	
<b>Total Invoice Amount</b>								<b>523.07</b>		
Direct Employee		VILLARREAL, PAULA S (170315)								
2021/22	12/16/21		MILEAGE	EP22-00023	01/04/22	Paid	Printed	25.31		25.31
			REIMBURSEMENT	(810417)						
Check #	2022 01-0000-0-5220-00-0000-2700-000-000-0000-00	00563402				Check Date 01/06/22	PO#		Register # 000167	
<b>Total Invoice Amount</b>								<b>25.31</b>		

Approval Batch 005531										Bank Account COUNTY - COUNTY	
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount	
Direct Vendor		CALIFORNIA'S VALUED TRUST (010974/2) P.O BOX 26300 FRESNO, CA 93729-6300									
2021/22	12/20/21		VISION/DENTAL JAN 22	DP22-00084 (811814)	01/10/22	Paid	Printed	3,667.71		3,667.71	
Check #	2022 01-0000-0-9514-	00563816									
							Check Date 01/13/22	PO#	Register # 000168		
<b>Total Invoice Amount</b>								<b>3,667.71</b>			
Direct Vendor		CENIOM (013011/1) P.O. BOX 340942 SACRAMENTO, CA 95834-0942									
2021/22	12/16/21		1 YR FIREWALL	12783 (811814)	01/10/22	Paid	Printed	882.42		882.42	
Check #	2022 01-0000-0-5800-00-0000-2420-000-000-0000-00	00563817									
							Check Date 01/13/22	PO#	Register # 000168		
<b>Total Invoice Amount</b>								<b>882.42</b>			
Direct Vendor		CLARK PEST CONTROL OF STOCKTON (001045/1) PO BOX 1480 LODI, CA 95241									
2021/22	12/02/21		PEST SERVICE DEC 21	29665292 (811814)	01/10/22	Paid	Printed	171.00		171.00	
Check #	2022 01-0000-0-5507-00-0000-8200-000-000-0000-00	00563818									
							Check Date 01/13/22	PO#	Register # 000168		
2021/22	01/05/22		PEST SERVICE JAN 22	29850612 (811814)	01/10/22	Paid	Printed	171.00		171.00	
Check #	2022 01-0000-0-5507-00-0000-8200-000-000-0000-00	00563818									
							Check Date 01/13/22	PO#	Register # 000168		
<b>Total Invoice Amount</b>								<b>342.00</b>			
Direct Vendor		ENVOY PLAN SERVICES INC CO TSACONSULTING GROUP INC (004144/2) PO BOX 2799 FORT WALTON BEACH, FL 32549-2799									
2021/22	12/14/21		TPA FEES NOV 21	74387 (811814)	01/10/22	Paid	Printed	9.00		9.00	
Check #	2022 01-0000-0-5800-00-0000-2700-000-000-0000-00	00563819									
							Check Date 01/13/22	PO#	Register # 000168		
<b>Total Invoice Amount</b>								<b>9.00</b>			

Approval Batch 005531 (continued)							Bank Account COUNTY - COUNTY			
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount
Direct Vendor			GOLD STAR FOODS (009670/1) P.O. BOX 4328 ONTARIO, CA 91761-1558							
2021/22	01/04/22		CAFETERIA FOOD	4446992 (811814)	01/10/22	Paid	Printed	1,593.38		1,593.38
Check #	2022 00563820	13- 5310- 0- 4700- 00- 0000- 3700- 000- 000- 0000- 00				Check Date 01/13/22	PO#		Register # 000168	
2021/22	01/04/22		CAFETERIA FOOD	4526580 (811814)	01/10/22	Paid	Printed	22.50		22.50
Check #	2022 00563820	13- 5310- 0- 4700- 00- 0000- 3700- 000- 000- 0000- 00				Check Date 01/13/22	PO#		Register # 000168	
<b>Total Invoice Amount</b>								<b>1,615.88</b>		

Direct Vendor			HOME DEPOT CREDIT SERVICES DEPT. 32 2001278484 (004490/1) P.O. BOX 9001030 LOUISVILLE, KY 40290-1030							
2021/22	11/22/21		CREDIT-FINANCE CHARGE	DP22-00086 (811814)	01/10/22	Paid	Printed	2.85-		2.85-
Check #	2022 00563821	01- 0000- 0- 4300- 00- 0000- 8100- 000- 000- 0000- 00				Check Date 01/13/22	PO#		Register # 000168	
2021/22	11/22/21		CREDIT-LATE FEE	DP22-00087 (811814)	01/10/22	Paid	Printed	40.00-		40.00-
Check #	2022 00563821	01- 0000- 0- 4300- 00- 0000- 8100- 000- 000- 0000- 00				Check Date 01/13/22	PO#		Register # 000168	
2021/22	11/27/21		LATE FEE REVERSAL	DP22-00088 (811814)	01/10/22	Paid	Printed	40.00-		40.00-
Check #	2022 00563821	01- 0000- 0- 4300- 00- 0000- 8100- 000- 000- 0000- 00				Check Date 01/13/22	PO#		Register # 000168	
2021/22	11/29/21		TOILET GASKETS	9524928 (811814)	01/10/22	Paid	Printed	12.85		12.85
Check #	2022 00563821	01- 0000- 0- 4300- 00- 0000- 8100- 000- 000- 0000- 00				Check Date 01/13/22	PO#		Register # 000168	
2021/22	12/11/21		XMAS LIGHT EXTENSION CORDS/ZIPTIES	7621382 (811814)	01/10/22	Paid	Printed	47.53		47.53
Check #	2022 00563821	01- 0000- 0- 4300- 00- 0000- 2700- 000- 000- 0000- 00				Check Date 01/13/22	PO#		Register # 000168	
2021/22	12/20/21		OPERATIONS SUPPLIES	8010694 (811814)	01/10/22	Paid	Printed	105.25		105.25
	2022	01- 0000- 0- 4300- 00- 0000- 8100- 000- 000- 0000- 00								

Approval Batch 005531 (continued)										Bank Account COUNTY - COUNTY	
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount	
Direct Vendor HOME DEPOT CREDIT SERVICES (continued)										(continued)	
Check #	00563821			DEPT. 32 2001278484 (004490/1)	(continued)			Check Date 01/13/22	PO#	Register # 000168	
								<b>Total Invoice Amount</b>	<b>82.78</b>		
Direct Vendor JOHN COKER AG REPAIR (012604/1)											
166 PLEASANT GROVE ROAD											
RIO OSO, CA 95674											
2021/22	12/31/21		BUS #2 45 DAY INSPECT	016254 (811814)	01/10/22	Paid	Printed	1,918.73		1,918.73	
Check #	00563822	2022 01-0000-0-5600-00-0000-3600-000-000-0000-00						Check Date 01/13/22	PO#	Register # 000168	
2021/22	12/31/21		BUS #1 45 DAY INSPECT	016302 (811814)	01/10/22	Paid	Printed	1,000.05		1,000.05	
Check #	00563822	2022 01-0000-0-5600-00-0000-3600-000-000-0000-00						Check Date 01/13/22	PO#	Register # 000168	
2021/22	12/31/21		BUS #3 45 DAY INSPECT	016305 (811814)	01/10/22	Paid	Printed	100.00		100.00	
Check #	00563822	2022 01-0000-0-5600-00-0000-3600-000-000-0000-00						Check Date 01/13/22	PO#	Register # 000168	
2021/22	12/31/21		MOWER REPAIR	016306 (811814)	01/10/22	Paid	Printed	100.00		100.00	
Check #	00563822	2022 01-0000-0-5600-00-0000-8100-000-000-0000-00						Check Date 01/13/22	PO#	Register # 000168	
								<b>Total Invoice Amount</b>	<b>3,118.78</b>		
Direct Vendor OFFICE EQUIPMENT FINANCE SVCS. (000438/1)											
P.O. BOX 790448											
ST. LOUIS, MO 63179-0448											
2021/22	12/24/21		COPIER LEASE	461137291 (811814)	01/10/22	Paid	Printed	1,548.85		1,548.85	
Check #	00563823	2022 01-0000-0-5600-00-1110-1000-000-000-0000-00						Check Date 01/13/22	PO#	Register # 000168	
								<b>Total Invoice Amount</b>	<b>1,548.85</b>		
Direct Vendor PACE ANALYTICAL SERVICES LLC (000044/2)											
PO BOX 684056											
CHICAGO, IL 60695-4056											
2021/22	12/16/21		WATER TESTING	2112384-28 (811814)	01/10/22	Paid	Printed	88.40		88.40	

Selection Sorted by Approval BatchId, Filtered by (Org = 17, Payment Method = N, Payment Type = N, On Hold? = Y, Approval Batch Id(s) = 005491,005531,005566,005579,005624,005668, Page Break by Check/Advice? = N, Zero? = Y)

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Approval Batch 005531 (continued)										Bank Account COUNTY - COUNTY	
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount	
Direct Vendor		PACE ANALYTICAL SERVICES LLC (000044/2) (continued)									
2021/22	12/16/21		WATER TESTING	2112384-28	01/10/22	Paid	Printed	(continued)			
			12/15/21	(811814) (continued)							
		2022 01- 0000- 0- 5800- 00- 0000- 8100- 000- 000- 0000- 00									
Check #	00563824					Check Date 01/13/22	PO#		Register # 000168		
<b>Total Invoice Amount</b>								<b>88.40</b>			
Direct Vendor		PROPACIFIC FRESH (014752/1) P.O. BOX 1069 DURHAM, CA 95938									
2021/22	01/03/22		CAFETERIA FOOD	6907359 (811814)	01/10/22	Paid	Printed	751.99		751.99	
		2022 13- 5310- 0- 4700- 00- 0000- 3700- 000- 000- 0000- 00									
Check #	00563825					Check Date 01/13/22	PO#		Register # 000168		
2021/22	01/03/22		CAFETERIA MILK	6907359-1 (811814)	01/10/22	Paid	Printed	344.88		344.88	
		2022 13- 5310- 0- 4712- 00- 0000- 3700- 000- 000- 0000- 00									
Check #	00563825					Check Date 01/13/22	PO#		Register # 000168		
<b>Total Invoice Amount</b>								<b>1,096.87</b>			
Direct Vendor		SUTTER COUNTY SUPERINTENDENT OF SCHOOLS OFFICE (004329/1) 970 KLAMATH LANE YUBA CITY, CA 95993									
2021/22	07/07/21		21-22 AESOP	AR22-00017 (811814)	01/10/22	Paid	Printed	3,145.50		3,145.50	
		2022 01- 0000- 0- 5800- 00- 0000- 2700- 000- 000- 0000- 00									
Check #	00563826					Check Date 01/13/22	PO#		Register # 000168		
2021/22	12/20/21		21-22 SPED EXCESS COST 1ST BILLING	AR22-00229 (811814)	01/10/22	Paid	Printed	9,484.00		9,484.00	
		2022 01- 6500- 0- 7142- 00- 5001- 9200- 000- 000- 0000- 00									
Check #	00563826					Check Date 01/13/22	PO#		Register # 000168		
2021/22	01/01/22		DATA PROCESSING 3RD QUARTER	AR22-00049 (811814)	01/10/22	Paid	Printed	620.10		620.10	
		2022 01- 0000- 0- 5800- 00- 0000- 7700- 000- 000- 0000- 00									
Check #	00563826					Check Date 01/13/22	PO#		Register # 000168		
<b>Total Invoice Amount</b>								<b>13,249.60</b>			



Approval Batch 005531 (continued)										Bank Account COUNTY - COUNTY	
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount	
Direct Vendor											
		TCSIG (004372/2) 400 PLUMAS BLVD STE 210 YUBA CITY, CA 95991									
2021/22	01/06/22		HEALTH JAN 22	DP22-00085 (811814)	01/10/22	Paid	Printed	17,259.00		17,259.00	
Check #		2022 01-0000-0-9514- - - - -					Check Date 01/13/22	PO#	Register # 000168		
								<b>Total Invoice Amount</b>	<b>17,259.00</b>		
Direct Vendor											
		THORNTON'S GAS (004577/1) 2041 WATT AVENUE EAST NICOLAUS, CA 95622									
2021/22	12/07/21		BUS PROPANE	128181 (811814)	01/10/22	Paid	Printed	145.66		145.66	
Check #		2022 01-0000-0-4300-00-0000-3600-000-000-0000-00					Check Date 01/13/22	PO#	Register # 000168		
2021/22	12/10/21		BUS PROPANE	128224 (811814)	01/10/22	Paid	Printed	68.16		68.16	
Check #		2022 01-0000-0-4300-00-0000-3600-000-000-0000-00					Check Date 01/13/22	PO#	Register # 000168		
2021/22	12/30/21		SCHOOL PROPANE	128521 (811814)	01/10/22	Paid	Printed	2,906.76		2,906.76	
Check #		2022 01-0000-0-5503-00-0000-8200-000-000-0000-00					Check Date 01/13/22	PO#	Register # 000168		
								<b>Total Invoice Amount</b>	<b>3,120.58</b>		

Approval Batch 005566										Bank Account COUNTY - COUNTY	
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount	
Direct Vendor		US BANK CORP. PAYMENT SYSTEM (004687/1) PO BOX 790428 ST. LOUIS, MO 63179-0428									
2021/22	11/10/21		SCIENCE SUPPLIES	2772 (812742)	01/13/22	Paid	Printed	10.71		10.71	
Check #	2022 01-0000-0-4300-00-1110-1000-000-0000-00	00564235				Check Date 01/18/22	PO#		Register # 000169		
2021/22	11/10/21		BINDERS	9288 (812742)	01/13/22	Paid	Printed	27.81		27.81	
Check #	2022 01-0000-0-4300-00-1110-1000-000-0000-00	00564235				Check Date 01/18/22	PO#		Register # 000169		
2021/22	11/11/21		SCIENCE SUPPLIES	3226 (812742)	01/13/22	Paid	Printed	16.13		16.13	
Check #	2022 01-0000-0-4300-00-1110-1000-000-0000-00	00564235				Check Date 01/18/22	PO#		Register # 000169		
2021/22	11/11/21		BINDERS/SKETCH PADS	5341 (812742)	01/13/22	Paid	Printed	40.63		40.63	
Check #	2022 01-0000-0-4300-00-1110-1000-000-0000-00	00564235				Check Date 01/18/22	PO#		Register # 000169		
2021/22	11/12/21		THERMOSTAT	7952 (812742)	01/13/22	Paid	Printed	63.00		63.00	
Check #	2022 01-0000-0-4300-00-0000-8100-000-000-0000-00	00564235				Check Date 01/18/22	PO#		Register # 000169		
2021/22	11/16/21		THERMOSTATS	0949 (812742)	01/13/22	Paid	Printed	113.40		113.40	
Check #	2022 01-0000-0-4300-00-0000-8100-000-000-0000-00	00564235				Check Date 01/18/22	PO#		Register # 000169		
2021/22	11/18/21		CLASSIFIED LOA/DEN LATE FORMS	3024 (812742)	01/13/22	Paid	Printed	370.36		370.36	
Check #	2022 01-0000-0-4300-00-0000-2700-000-000-0000-00	00564235				Check Date 01/18/22	PO#		Register # 000169		
2021/22	11/23/21		CARDSTOCK	2994 (812742)	01/13/22	Paid	Printed	45.00		45.00	
Check #	2022 01-0000-0-4300-00-0000-2700-000-000-0000-00	00564235				Check Date 01/18/22	PO#		Register # 000169		
2021/22	11/23/21		STAR TO STAR PHONES 11/19-12/18	9366 (812742)	01/13/22	Paid	Printed	643.45		643.45	
Check #	2022 01-0000-0-5900-00-0000-2700-000-000-0000-00	00564235				Check Date 01/18/22	PO#		Register # 000169		
2021/22	12/01/21		PREK SUPPLIES	5210 (812742)	01/13/22	Paid	Printed	19.29		19.29	
	2022 12-6105-0-4300-00-0001-1000-000-000-0000-00										

Selection Sorted by Approval BatchId, Filtered by (Org = 17, Payment Method = N, Payment Type = N, On Hold? = Y, Approval Batch Id(s) = 005491,005531,005566,005579,005624,005668, Page Break by Check/Advice? = N, Zero? = Y)

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Approval Batch 005566 (continued)							Bank Account COUNTY - COUNTY			
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount
Direct Vendor		US BANK CORP. PAYMENT SYSTEM (004687/1)			(continued)		(continued)			
Check #	00564235					Check Date	01/18/22	PO#	Register #	000169
2021/22	12/01/21		PREK SUPPLIES	5733 (812742)	01/13/22	Paid	Printed	48.78		48.78
	2022	12- 6105- 0- 4300- 00- 0001- 1000- 000- 000- 0000- 00								
Check #	00564235					Check Date	01/18/22	PO#	Register #	000169
2021/22	12/01/21		APPLE	7696 (812742)	01/13/22	Paid	Printed	10.74		10.74
	2022	01- 0000- 0- 4300- 00- 0000- 2700- 000- 000- 0000- 00								
Check #	00564235					Check Date	01/18/22	PO#	Register #	000169
2021/22	12/03/21		PREK SUPPLIES	6008 (812742)	01/13/22	Paid	Printed	27.83		27.83
	2022	12- 6105- 0- 4300- 00- 0001- 1000- 000- 000- 0000- 00								
Check #	00564235					Check Date	01/18/22	PO#	Register #	000169
2021/22	12/03/21		STUDENT RECORD POSTAGE	8622 (812742)	01/13/22	Paid	Printed	8.70		8.70
	2022	01- 0000- 0- 5902- 00- 0000- 2700- 000- 000- 0000- 00								
Check #	00564235					Check Date	01/18/22	PO#	Register #	000169
2021/22	12/03/21		6TH-8TH HONOR ROLL TRIP	9065 (812742)	01/13/22	Paid	Printed	804.03		804.03
	2022	01- 0000- 0- 5800- 00- 0000- 2700- 000- 000- 0000- 00								
Check #	00564235					Check Date	01/18/22	PO#	Register #	000169
2021/22	12/05/21		APPLE	1175 (812742)	01/13/22	Paid	Printed	4.29		4.29
	2022	01- 0000- 0- 4300- 00- 0000- 2700- 000- 000- 0000- 00								
Check #	00564235					Check Date	01/18/22	PO#	Register #	000169
2021/22	12/09/21		AIR FRESHENER	3174 (812742)	01/13/22	Paid	Printed	42.89		42.89
	2022	01- 0000- 0- 4300- 00- 0000- 8100- 000- 000- 0000- 00								
Check #	00564235					Check Date	01/18/22	PO#	Register #	000169
2021/22	12/09/21		APPLE	9957 (812742)	01/13/22	Paid	Printed	.99		.99
	2022	01- 0000- 0- 4300- 00- 0000- 2700- 000- 000- 0000- 00								
Check #	00564235					Check Date	01/18/22	PO#	Register #	000169
<b>Total Invoice Amount</b>								<b>2,298.03</b>		
Direct Vendor		VERIZON WIRELESS (009718/1) P.O. BOX 660108 DALLAS, TX 75266-0108								
2021/22	01/02/22		CELL SERVICE	9896432547 (812742)	01/13/22	Paid	Printed	304.20		304.20
			12/3-1/2							
	2022	01- 0000- 0- 5900- 00- 0000- 2700- 000- 000- 0000- 00								
Check #	00564236					Check Date	01/18/22	PO#	Register #	000169

Selection Sorted by Approval BatchId, Filtered by (Org = 17, Payment Method = N, Payment Type = N, On Hold? = Y, Approval Batch Id(s) = 005491,005531,005566,005579,005624,005668, Page Break by Check/Advice? = N, Zero? = Y)

ESCAPE ONLINE

Approval Batch 005566 (continued)							Bank Account COUNTY - COUNTY			
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount

Total Invoice Amount 304.20

Approval Batch 005579							Bank Account COUNTY - COUNTY				
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount	
Direct Employee		LONG, CAROL (170381)									
2021/22	01/12/22		CAFETERIA FOOD	EP22-00024 (813284)	01/14/22	Paid	Printed	11.37		11.37	
Check #	00564237	2022 13-5310-0-4700-00-0000-3700-000-000-0000-00				Check Date 01/18/22	PO#		Register # 000170		
2021/22	01/12/22		CAFETERIA SUPPLIES	EP22-00025 (813284)	01/14/22	Paid	Printed	40.59		40.59	
Check #	00564237	2022 13-5310-0-4300-00-0000-3700-000-000-0000-00				Check Date 01/18/22	PO#		Register # 000170		
<b>Total Invoice Amount</b>								<b>51.96</b>			

Approval Batch 005624										Bank Account COUNTY - COUNTY	
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount	
Direct Vendor AT&T (003812/1) PO BOX 5025 CAROL STREAM, IL 60197-5025											
2021/22	01/07/22		FIBER 1/7-2/6	DP22-00094 (816011)	01/25/22	Paid	Printed	1,053.04		1,053.04	
Check #	00564662	2022 01-0000-0-5900-00-0000-2700-000-000-0000-00				Check Date 01/27/22	PO#		Register # 000171		
2021/22	01/10/22		1022 1/10-2/9	DP22-00092 (816011)	01/25/22	Paid	Printed	47.65		47.65	
Check #	00564662	2022 01-0000-0-5900-00-0000-2700-000-000-0000-00				Check Date 01/27/22	PO#		Register # 000171		
2021/22	01/10/22		1249 1/10-2/9	DP22-00093 (816011)	01/25/22	Paid	Printed	25.18		25.18	
Check #	00564662	2022 01-0000-0-5900-00-0000-2700-000-000-0000-00				Check Date 01/27/22	PO#		Register # 000171		
<b>Total Invoice Amount</b>								<b>1,125.87</b>			
Direct Vendor AT&T CALNET (003812/2) P.O. BOX 9011 CAROL STREAM, IL 60197-9011											
2021/22	01/07/22		LATE FEES	DP22-00095 (816011)	01/25/22	Paid	Printed	15.80		15.80	
Check #	00564663	2022 01-0000-0-5800-00-0000-2700-000-000-0000-00				Check Date 01/27/22	PO#		Register # 000171		
<b>Total Invoice Amount</b>								<b>15.80</b>			
Direct Vendor CALIFORNIA'S VALUED TRUST (010974/1) 520 EAST HERNDON AVE FRESNO, CA 93720											
2021/22	01/18/22		VISION/DENTAL FEB 22	DP22-00091 (816011)	01/25/22	Paid	Printed	3,667.71		3,667.71	
Check #	00564664	2022 01-0000-0-9514- - - - -				Check Date 01/27/22	PO#		Register # 000171		
<b>Total Invoice Amount</b>								<b>3,667.71</b>			
Direct Vendor CENIOM (013011/1) P.O. BOX 340942 SACRAMENTO, CA 95834-0942											
2021/22	01/14/22		MONTHLY TECH JAN 22	12851 (816011)	01/25/22	Paid	Printed	1,200.00		1,200.00	

Selection Sorted by Approval BatchId, Filtered by (Org = 17, Payment Method = N, Payment Type = N, On Hold? = Y, Approval Batch Id(s) = 005491,005531,005566,005579,005624,005668, Page Break by Check/Advice? = N, Zero? = Y)

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Approval Batch 005624 (continued)							Bank Account COUNTY - COUNTY				
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount	
Direct Vendor		CENIOM (013011/1)		(continued)							
2021/22	01/14/22		MONTHLY TECH JAN 22	12851 (816011)	01/25/22	Paid	Printed	(continued)			
Check #	00564665	2022 01- 0000- 0- 5800- 00- 0000- 2420- 000- 000- 0000- 00				Check Date 01/27/22	PO#		Register # 000171		
2021/22	01/21/22		CHROMEBOOKS/FE ES	12854 (816011)	01/25/22	Paid	Printed	25,874.64		25,874.64	
Check #	00564665	2022 01- 0000- 0- 4400- 00- 1110- 1000- 000- 000- 0000- 00				Check Date 01/27/22	PO#		Register # 000171		
2021/22	01/21/22		BELL SOFTWARE SUBSCRIPT. 3 YEAR	12855 (816011)	01/25/22	Paid	Printed	1,491.50		1,491.50	
Check #	00564665	2022 01- 0000- 0- 5800- 00- 0000- 2700- 000- 000- 0000- 00				Check Date 01/27/22	PO#		Register # 000171		
<b>Total Invoice Amount</b>								<b>28,566.14</b>			
Direct Vendor		DOMINO'S (000031/2) 1545 N TEXAS ST SUITE 306 FAIRFIELD, CA 94533									
2021/22	01/14/22		PIZZA LUNCH 1/14/22	78 (816011)	01/25/22	Paid	Printed	189.50		189.50	
Check #	00564666	2022 13- 5310- 0- 5800- 00- 0000- 3700- 000- 000- 0000- 00				Check Date 01/27/22	PO#		Register # 000171		
2021/22	01/21/22		PIZZA LUNCH 1/21/22	81 (816011)	01/25/22	Paid	Printed	199.50		199.50	
Check #	00564666	2022 13- 5310- 0- 5800- 00- 0000- 3700- 000- 000- 0000- 00				Check Date 01/27/22	PO#		Register # 000171		
<b>Total Invoice Amount</b>								<b>389.00</b>			
Direct Vendor		EAST NICOLAUS JOINT UHSD (001533/1) 2454 NICOLAUS AVE TROWBRIDGE, CA 95659									
2021/22	01/12/22		TRACTOR FUEL OCT-DEC 21	AR22-00012 (816011)	01/25/22	Paid	Printed	40.50		40.50	
Check #	00564667	2022 01- 0000- 0- 4300- 00- 0000- 8100- 000- 000- 0000- 00				Check Date 01/27/22	PO#		Register # 000171		
<b>Total Invoice Amount</b>								<b>40.50</b>			

Approval Batch 005624 (continued)							Bank Account COUNTY - COUNTY			
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount
Direct Vendor		ENVOY PLAN SERVICES INC CO TSACONSULTING GROUP INC (004144/2) PO BOX 2799 FORT WALTON BEACH, FL 32549-2799								
2021/22	01/14/22		TPA FEES DEC 21	75606 (816011)	01/25/22	Paid	Printed	9.00		9.00
		2022 01- 0000- 0- 5800- 00- 0000- 2700- 000- 000- 0000- 00								
Check #	00564668			Check Date 01/27/22		PO#	Register # 000171			
<b>Total Invoice Amount</b>								<b>9.00</b>		
Direct Vendor		KAJEET INC (000016/1) 7901 JONES BRANCH DR STE 350 MCLEAN, VA 22102								
2021/22	01/18/22		4 MONTHS UNLIMITED FOR 80 DEVICES	INV20919 (816011)	01/25/22	Paid	Printed	6,321.60		6,321.60
		2022 01- 0000- 0- 5900- 00- 1110- 1000- 000- 000- 0000- 00								
Check #	00564669			Check Date 01/27/22		PO#	Register # 000171			
<b>Total Invoice Amount</b>								<b>6,321.60</b>		
Direct Vendor		RECOLOGY YUBA-SUTTER (005096/1) PO DRAWER G MARYSVILLE, CA 95901								
2021/22	01/15/22		RECOLOGY JAN 22	69772440 (816011)	01/25/22	Paid	Printed	505.35		505.35
		2022 01- 0000- 0- 5506- 00- 0000- 8200- 000- 000- 0000- 00								
Check #	00564670			Check Date 01/27/22		PO#	Register # 000171			
<b>Total Invoice Amount</b>								<b>505.35</b>		
Direct Vendor		SOUTH SUTTER CHARTER SCHOOL (000215/1) P.O. BOX 1012 PLACERVILLE, CA 95667								
2021/22	01/25/22		PROPERTY TAX IN LIEU JAN 22	DP22-00089 (816011)	01/25/22	Paid	Printed	33,973.00		33,973.00
		2022 01- 0000- 0- 8096- 00- 0000- 0000- 000- 000- 0000- 00								
Check #	00564671			Check Date 01/27/22		PO#	Register # 000171			
2021/22	01/25/22		PROPERTY TAX IN LIEU FEB 22	DP22-00090 (816011)	01/25/22	Paid	Printed	33,973.00		33,973.00
		2022 01- 0000- 0- 8096- 00- 0000- 0000- 000- 000- 0000- 00								
Check #	00564671			Check Date 01/27/22		PO#	Register # 000171			
<b>Total Invoice Amount</b>								<b>67,946.00</b>		

Selection Sorted by Approval BatchId, Filtered by (Org = 17, Payment Method = N, Payment Type = N, On Hold? = Y, Approval Batch Id(s) = 005491,005531,005566,005579,005624,005668, Page Break by Check/Advice? = N, Zero? = Y)

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Approval Batch 005624 (continued)										Bank Account COUNTY - COUNTY	
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount	
Direct Vendor		STAPLES ADVANTAGE DEPT LA (000322/1) P O BOX 83689 CHICAGO, IL 60696-3689									
2021/22	01/08/22		GR 1 FOLDERS	3497085207 (816011)	01/25/22	Paid	Printed	53.73		53.73	
Check #	2022 01-0000-0-4300-00-1110-1000-000-0000-00 00564672					Check Date 01/27/22	PO#		Register # 000171		
2021/22	01/08/22		GR 8 GRAPH EASEL PADS	3497085209 (816011)	01/25/22	Paid	Printed	80.79		80.79	
Check #	2022 01-0000-0-4300-00-1110-1000-000-0000-00 00564672					Check Date 01/27/22	PO#		Register # 000171		
<b>Total Invoice Amount</b>								<b>134.52</b>			
Direct Vendor		SYSCO FOOD SVCS OF SACRAMENTO (000043/2) PO BOX 138007 SACRAMENTO, CA 95813-8007									
2021/22	01/12/22		CAFETERIA FOOD	331535333 (816011)	01/25/22	Paid	Printed	470.73		470.73	
Check #	2022 13-5310-0-4700-00-0000-3700-000-000-0000-00 00564673					Check Date 01/27/22	PO#		Register # 000171		
2021/22	01/12/22		CAFETERIA SUPPLIES	331535333-1 (816011)	01/25/22	Paid	Printed	423.74		423.74	
Check #	2022 13-5310-0-4300-00-0000-3700-000-000-0000-00 00564673					Check Date 01/27/22	PO#		Register # 000171		
<b>Total Invoice Amount</b>								<b>894.47</b>			

Approval Batch 005668							Bank Account COUNTY - COUNTY			
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount
Direct Vendor		DOMINO'S (000031/2) 1545 N TEXAS ST SUITE 306 FAIRFIELD, CA 94533								
2021/22	11/19/21		PIZZA LUNCH	58 (819150)	02/01/22	Paid	Printed	249.50		249.50
Check #	2022 00565040	13- 5310- 0- 5800- 00- 0000- 3700- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172	
2021/22	12/03/21		PIZZA LUNCH	62 (819150)	02/01/22	Paid	Printed	209.50		209.50
Check #	2022 00565040	13- 5310- 0- 5800- 00- 0000- 3700- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172	
2021/22	12/10/21		PIZZA LUNCH	66 (819150)	02/01/22	Paid	Printed	239.50		239.50
Check #	2022 00565040	13- 5310- 0- 5800- 00- 0000- 3700- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172	
2021/22	12/16/21		PIZZA LUNCH	69 (819150)	02/01/22	Paid	Printed	289.50		289.50
Check #	2022 00565040	13- 5310- 0- 5800- 00- 0000- 3700- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172	
2021/22	01/10/22		PIZZA LUNCH	74 (819150)	02/01/22	Paid	Printed	219.50		219.50
Check #	2022 00565040	13- 5310- 0- 5800- 00- 0000- 3700- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172	
<b>Total Invoice Amount</b>								<b>1,207.50</b>		
Direct Employee		EMMITT, STACI (170545)								
2021/22	01/31/22		SATURDAY SCHOOL SUPPLIES	EP22-00027 (819150)	02/01/22	Paid	Printed	43.62		43.62
Check #	2022 00565041	01- 0000- 0- 4300- 00- 1110- 1000- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172	
<b>Total Invoice Amount</b>								<b>43.62</b>		
Direct Employee										
2021/22	01/25/22		SATURDAY SCHOOL SUPPLIES	EP22-00026 (819150)	02/01/22	Paid	Printed	46.52		46.52
Check #	2022 00565042	01- 0000- 0- 4300- 00- 1110- 1000- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172	
<b>Total Invoice Amount</b>								<b>46.52</b>		

Approval Batch 005668 (continued)										Bank Account COUNTY - COUNTY	
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount	
Direct Vendor		GOLD STAR FOODS (009670/1) P.O. BOX 4328 ONTARIO, CA 91761-1558									
2021/22	01/18/22		CAFETERIA FOOD	4534318 (819150)	02/01/22	Paid	Printed	1,975.57		1,975.57	
Check #	2022 00565043	13- 5310- 0- 4700- 00- 0000- 3700- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172		
2021/22	01/18/22		CAFETERIA FOOD	4587112 (819150)	02/01/22	Paid	Printed	6.75		6.75	
Check #	2022 00565043	13- 5310- 0- 4700- 00- 0000- 3700- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172		
<b>Total Invoice Amount</b>								<b>1,982.32</b>			
Direct Vendor		J&J HEATING & AIR (002504/2) PO BOX 671 LIVE OAK, CA 95953									
2021/22	01/25/22		KITCHEN FREEZER REPAIR	7594 (819150)	02/01/22	Paid	Printed	325.13		325.13	
Check #	2022 00565044	01- 0000- 0- 5600- 00- 0000- 8100- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172		
2021/22	01/31/22		GR 7 HVAC UNIT IGNITION/CIRCUIT BOARD	01252022MARCUM (819150)	02/01/22	Paid	Printed	1,185.00		1,185.00	
Check #	2022 00565044	01- 0000- 0- 5600- 00- 0000- 8100- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172		
<b>Total Invoice Amount</b>								<b>1,510.13</b>			
Direct Vendor		PACIFIC GAS & ELECTRIC (003433/1) PO BOX 997300 SACRAMENTO, CA 95899-7300									
2021/22	01/12/22		FEB 21-JAN 22 TRUE UP	DP22-00096 (819150)	02/01/22	Paid	Printed	28,791.58		28,791.58	
Check #	2022 00565045	01- 0000- 0- 5502- 00- 0000- 8200- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172		
2021/22	01/12/22		ELECTRICITY 12/7-1/4	DP22-00097 (819150)	02/01/22	Paid	Printed	959.73		959.73	
Check #	2022 00565045	01- 0000- 0- 5502- 00- 0000- 8200- 000- 000- 0000- 00				Check Date 02/03/22	PO#		Register # 000172		
<b>Total Invoice Amount</b>								<b>29,751.31</b>			

Approval Batch 005668 (continued)										Bank Account COUNTY - COUNTY	
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount	
Direct Vendor		PROPACIFIC FRESH (014752/1) P.O. BOX 1069 DURHAM, CA 95938									
2021/22	01/18/22		CAFETERIA FOOD	6910344 (819150)	02/01/22	Paid	Printed	751.24		751.24	
Check #	2022 00565046	13- 5310- 0- 4700- 00- 0000- 3700- 000- 000- 0000- 00				Check Date	02/03/22	PO#	Register #	000172	
2021/22	01/18/22		CAFETERIA MILK	6910344-1 (819150)	02/01/22	Paid	Printed	282.02		282.02	
Check #	2022 00565046	13- 5310- 0- 4712- 00- 0000- 3700- 000- 000- 0000- 00				Check Date	02/03/22	PO#	Register #	000172	
2021/22	01/18/22		CAFETERIA SUPPLIES	6910344-2 (819150)	02/01/22	Paid	Printed	24.98		24.98	
Check #	2022 00565046	13- 5310- 0- 4300- 00- 0000- 3700- 000- 000- 0000- 00				Check Date	02/03/22	PO#	Register #	000172	
<b>Total Invoice Amount</b>								<b>1,058.24</b>			
Direct Vendor		SAM'S CLUB (009139/1) P.O. BOX 530930 ATLANTA, GA 30353-0930									
2021/22	12/16/21		CAFETERIA FOOD	DP22-00098 (819150)	02/01/22	Paid	Printed	54.82		54.82	
Check #	2022 00565047	13- 5310- 0- 4700- 00- 0000- 3700- 000- 000- 0000- 00				Check Date	02/03/22	PO#	Register #	000172	
2021/22	12/16/21		CAFETERIA SUPPLIES	DP22-00099 (819150)	02/01/22	Paid	Printed	58.89		58.89	
Check #	2022 00565047	13- 5310- 0- 4300- 00- 0000- 3700- 000- 000- 0000- 00				Check Date	02/03/22	PO#	Register #	000172	
2021/22	12/20/21		VAN FUEL	004200 (819150)	02/01/22	Paid	Printed	73.01		73.01	
Check #	2022 00565047	01- 0000- 0- 4300- 00- 0000- 2700- 000- 000- 0000- 00				Check Date	02/03/22	PO#	Register #	000172	
2021/22	01/06/22		BOARD MEETING SUPPLIES	DP22-00100 (819150)	02/01/22	Paid	Printed	34.38		34.38	
Check #	2022 00565047	01- 0000- 0- 4300- 00- 0000- 7100- 000- 000- 0000- 00				Check Date	02/03/22	PO#	Register #	000172	
2021/22	01/06/22		IRBY OFFICE CANDY	DP22-00101 (819150)	02/01/22	Paid	Printed	174.22		174.22	
Check #	2022 00565047	01- 0000- 0- 4300- 00- 0000- 2700- 000- 000- 0000- 00				Check Date	02/03/22	PO#	Register #	000172	

Selection Sorted by Approval BatchId, Filtered by (Org = 17, Payment Method = N, Payment Type = N, On Hold? = Y, Approval Batch Id(s) = 005491,005531,005566,005579,005624,005668, Page Break by Check/Advice? = N, Zero? = Y)

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Approval Batch 005668 (continued)							Bank Account COUNTY - COUNTY			
Fiscal Year	Invoice Date	Req #	Comment	Payment Id (Trans Batch Id)	Sched	Paymt Status	Check Status	Invoice Amount	Unpaid Sales Tax	Expense Amount
Direct Vendor		SAM'S CLUB (009139/1) (continued)			(continued)					
2021/22	01/07/22		OPERATIONS SUPPLIES	DP22-00102 (819150)	02/01/22	Paid	Printed	120.03		120.03
Check #	2022 01-0000-0-4300-00-0000-8100-000-000-0000-00	00565047				Check Date	02/03/22	PO#		Register # 000172
2021/22	01/14/22		CAFETERIA SUPPLIES	DP22-00103 (819150)	02/01/22	Paid	Printed	43.37		43.37
Check #	2022 13-5310-0-4300-00-0000-3700-000-000-0000-00	00565047				Check Date	02/03/22	PO#		Register # 000172
2021/22	01/14/22		CAFETERIA FOOD	DP22-00104 (819150)	02/01/22	Paid	Printed	119.10		119.10
Check #	2022 13-5310-0-4700-00-0000-3700-000-000-0000-00	00565047				Check Date	02/03/22	PO#		Register # 000172
2021/22	01/14/22		OFFICE SUPPLIES	DP22-00105 (819150)	02/01/22	Paid	Printed	27.31		27.31
Check #	2022 01-0000-0-4300-00-0000-2700-000-000-0000-00	00565047				Check Date	02/03/22	PO#		Register # 000172
<b>Total Invoice Amount</b>								<b>705.13</b>		
Direct Vendor		SUTTER COUNTY SUPERINTENDENT OF SCHOOLS OFFICE (004329/1) 970 KLAMATH LANE YUBA CITY, CA 95993								
2021/22	01/18/22		21-22 SUTTERNET INSTALL 1 OF 2	AR22-000246 (819150)	02/01/22	Paid	Printed	350.00		350.00
Check #	2022 01-0000-0-5900-00-0000-7200-000-000-0000-00	00565048				Check Date	02/03/22	PO#		Register # 000172
<b>Total Invoice Amount</b>								<b>350.00</b>		
Direct Vendor		WAXIE'S ENTERPRISES INC (029397/1) PO BOX 748802 LOS ANGELES, CA 90074								
2021/22	01/26/22		OPERATIONS SUPPLIES	80618995 (819150)	02/01/22	Paid	Printed	612.55		612.55
Check #	2022 01-0000-0-4300-00-0000-8100-000-000-0000-00	00565049				Check Date	02/03/22	PO#		Register # 000172
<b>Total Invoice Amount</b>								<b>612.55</b>		
Selection Sorted by Approval BatchId, Filtered by (Org = 17, Payment Method = N, Payment Type = N, On Hold? = Y, Approval Batch Id(s) = 005491,005531,005566,005579,005624,005668, Page Break by Check/Advice? = N, Zero? = Y)								ESCAPE ONLINE		

EXPENSES BY FUND - Bank Account COUNTY			
Fund	Expense	Cash Balance	Difference
01	191,385.34	870,886.36	679,501.02
12	249.34	4,906.48	4,657.14
13	8,572.42	13,058.94-	21,631.36-
<b>Total</b>	<b>200,207.10</b>		

Number of Payments	109	
Number of Checks	46	\$200,207.10
Number of ACH Advice	0	
Number of vCard Advice	0	
Total Check/Advice Amount	\$200,207.10	
Total Unpaid Sales Tax	\$ .00	
Total Expense Amount	\$200,207.10	
<hr/>		
CHECK/ADVICE AMOUNT DISTRIBUTION COUNTS		
\$0 - \$99	10	
\$100 - \$499	7	
\$500 - \$999	8	
\$1,000 - \$4,999	15	
\$5,000 - \$9,999	1	
\$10,000 - \$14,999	1	
\$15,000 - \$99,999	4	
\$100,000 - \$199,999		
\$200,000 - \$499,999		
\$500,000 - \$999,999		
\$1,000,000 -		
<hr/>		
***** ITEMS OF INTEREST *****		
* Number of payments to a different vendor		
! Number of Prepaid payments		
@ Number of Liability payments		
& Number of Employee Also Vendors		
? denotes check name different than payment name		
F denotes Final Payment		

Report Totals - Payment Count **109** Check Count **46** ACH Count **0** vCard Count **0** Total Check/Advice Amount **200,207.10**  
**\$200,207.10**

Selection Sorted by Approval BatchId, Filtered by (Org = 17, Payment Method = N, Payment Type = N, On Hold? = Y, Approval Batch Id(s) = 005491,005531,005566,005579,005624,005668, Page Break by Check/Advice? = N, Zero? = Y)

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## Checks Dated 01/06/2022 through 02/03/2022

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
00563395	01/06/2022	ALHAMBRA & SIERRA SPRINGS	01-5800		163.80
00563396	01/06/2022	AT&T	01-5900		1,127.46
00563397	01/06/2022	ATTN: DRINKING WATER PROGRAM	01-5800		635.00
00563398	01/06/2022	CENIOM	01-5800		1,200.00
00563399	01/06/2022	PACIFIC GAS & ELECTRIC	01-5502		694.87
00563400	01/06/2022	SAM'S CLUB	01-4300	64.81	
			12-4300	153.44	218.25
00563401	01/06/2022	STAPLES ADVANTAGE DEPT LA	01-4300		523.07
00563402	01/06/2022	VILLARREAL, PAULA S	01-5220		25.31
00563816	01/13/2022	CALIFORNIA'S VALUED TRUST	01-9514		3,667.71
00563817	01/13/2022	CENIOM	01-5800		882.42
00563818	01/13/2022	CLARK PEST CONTROL OF STOCKTON	01-5507		342.00
00563819	01/13/2022	ENVOY PLAN SERVICES INC CO TSA CONSULTING GROUP INC	01-5800		9.00
00563820	01/13/2022	GOLD STAR FOODS	13-4700		1,615.88
00563821	01/13/2022	HOME DEPOT CREDIT SERVICES DEPT. 32 2001278484	01-4300		82.78
00563822	01/13/2022	JOHN COKER AG REPAIR	01-5600		3,118.78
00563823	01/13/2022	OFFICE EQUIPMENT FINANCE SVCS.	01-5600		1,548.85
00563824	01/13/2022	PACE ANALYTICAL SERVICES LLC	01-5800		88.40
00563825	01/13/2022	PROPACIFIC FRESH	13-4700	751.99	
			13-4712	344.88	1,096.87
00563826	01/13/2022	SUTTER COUNTY SUPERINTENDENT OF SCHOOLS OFFICE	01-5800	3,765.60	
			01-7142	9,484.00	13,249.60
00563827	01/13/2022	TCSIG	01-9514		17,259.00
00563828	01/13/2022	THORNTON'S GAS	01-4300	213.82	
			01-5503	2,906.76	3,120.58
00564235	01/18/2022	US BANK CORP. PAYMENT SYSTEM	01-4300	745.95	
			01-5800	804.03	
			01-5900	643.45	
			01-5902	8.70	
			12-4300	95.90	2,298.03
00564236	01/18/2022	VERIZON WIRELESS	01-5900		304.20
00564237	01/18/2022	LONG, CAROL	13-4300	40.59	
			13-4700	11.37	51.96
00564662	01/27/2022	AT&T	01-5900		1,125.87
00564663	01/27/2022	AT&T CALNET	01-5800		15.80
00564664	01/27/2022	CALIFORNIA'S VALUED TRUST	01-9514		3,667.71
00564665	01/27/2022	CENIOM	01-4400	25,874.64	
			01-5800	2,691.50	28,566.14
00564666	01/27/2022	DOMINO'S	13-5800		389.00
00564667	01/27/2022	EAST NICOLAUS JOINT UHSD	01-4300		40.50

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.

ESCAPE ONLINE

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**Checks Dated 01/06/2022 through 02/03/2022**

Check Number	Check Date	Pay to the Order of	Fund-Object	Expensed Amount	Check Amount
00564668	01/27/2022	ENVOY PLAN SERVICES INC CO TSA CONSULTING GROUP INC	01-5800		9.00
00564669	01/27/2022	KAJEET INC	01-5900		6,321.60
00564670	01/27/2022	RECOLOGY YUBA-SUTTER	01-5506		505.35
00564671	01/27/2022	SOUTH SUTTER CHARTER SCHOOL	01-8096		67,946.00
00564672	01/27/2022	STAPLES ADVANTAGE DEPT LA	01-4300		134.52
00564673	01/27/2022	SYSKO FOOD SVCS OF SACRAMENTO	13-4300	423.74	
			13-4700	470.73	894.47
00565040	02/03/2022	DOMINO'S	13-5800		1,207.50
00565041	02/03/2022	EMMITT, STACI	01-4300		43.62
00565042	02/03/2022	FORD, SHASTA L	01-4300		46.52
00565043	02/03/2022	GOLD STAR FOODS	13-4700		1,982.32
00565044	02/03/2022	J&J HEATING & AIR	01-5600		1,510.13
00565045	02/03/2022	PACIFIC GAS & ELECTRIC	01-5502		29,751.31
00565046	02/03/2022	PROPACIFIC FRESH	13-4300	24.98	
			13-4700	751.24	
			13-4712	282.02	1,058.24
00565047	02/03/2022	SAM'S CLUB	01-4300	428.95	
			13-4300	102.26	
			13-4700	173.92	705.13
00565048	02/03/2022	SUTTER COUNTY SUPERINTENDENT OF SCHOOLS OFFICE	01-5900		350.00
00565049	02/03/2022	WAXIE'S ENTERPRISES INC	01-4300		612.55
<b>Total Number of Checks</b>			<b>46</b>		<b>200,207.10</b>

**Fund Recap**

Fund	Description	Check Count	Expensed Amount
01	GENERAL FUND	38	191,385.34
12	CHILD DEVELOPMENT	2	249.34
13	CAFETERIA	9	8,572.42
Total Number of Checks		<b>46</b>	200,207.10
Less Unpaid Tax Liability			.00
<b>Net (Check Amount)</b>			<b>200,207.10</b>

The preceding Checks have been issued in accordance with the District's Policy and authorization of the Board of Trustees. It is recommended that the preceding Checks be approved.



## Marcum-Illinois Union Elementary School District

### 2021-22 LCAP Mid-Year Update

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Marcum-Illinois Union Elementary School District	Maggie Irby, Superintendent/Principal	<a href="mailto:Maggiei@sutter.k12.ca.us">Maggiei@sutter.k12.ca.us</a> 530-656-2407

Goal #	Description		
1	Provide a high-quality, effective instructional program that ensures college and career readiness by addressing the unique needs and abilities of all students.		
	Metric	Baseline	Mid-Year
	<b>Basic Services</b> Percent of teachers appropriately assigned and fully credentialed.  Source: SARC	February 2021 100%	February 2022 100%
	<b>Basic Services</b> Percent of students with sufficient access to standards-aligned instructional materials  Source: SARC	February 2021 100%	February 2022 100%
	<b>Implementation of State Standards</b> Progress (1-5) in implementing programs to support staff in identifying areas they can improve in delivery of instruction.  Source: Local Indicator Survey	February 2021 ELA: 4 ELD: 3 Math: 3 NGSS: 2 HSS: 3	We will not have this data until February 2022
	<b>Implementation of State Standards</b> Percent of English learners scoring Standard Met in ELA on local assessment (NWEA MAP).  Source: Local Assessment Data	Winter 2021 25%	Winter 2022 0%

Metric	Baseline	Mid-Year
<p><b>Pupil Achievement</b> Distance from Standard Met on CAASPP</p> <p>Source: CA School Dashboard</p>	<p>Fall 2019</p> <p>ELA 13.2 above – All 9.8 below – Low-Income</p> <p>Math 6.1 above – All 20.1 below – Low-Income</p>	<p>This information is not available</p>
<p><b>Pupil Achievement</b> Percent of students scoring Met or Exceed Standard on CAASPP Summative Assessment (Grades 3-8)</p> <p>Source: CAASPP Data</p>	<p>Spring 2019</p> <p>ELA 57% – All 48% – Low-Income</p> <p>Math 52% – All 44% – Low-Income</p> <p>Science 49% – All (5<sup>th</sup> &amp; 8<sup>th</sup>)</p>	<p>Spring 2021</p> <p>ELA 48.18% – All 40.43% – Low-Income</p> <p>Math 43.64% – All 25.53% – Low-Income</p> <p>Science 32.35% – All (5<sup>th</sup> &amp; 8<sup>th</sup>)</p>
<p><b>Pupil Achievement</b> Percentage of EL pupils who make progress toward English proficiency as measured by ELPAC</p> <p>Source: CA School Dashboard</p>	<p>Fall 2019</p> <p>45.5%</p>	<p>Fall 2021</p> <p>20% (Local data)</p>
<p><b>Pupil Achievement</b> EL Reclassification Rate</p> <p>Source: Local Data</p>	<p>2019/20</p> <p>0 students were reclassified because there was no ELPAC testing in spring 2020</p>	<p>2021/22</p> <p>10%</p>
<p><b>Course Access</b> LEA's progress (1-5) implementing academic standards for all students.</p> <p>Source: Local Indicator Survey</p>	<p>February 2021</p> <p>CTE: 3 Physical Education: 4 VAPA: 3</p>	<p>We will not have this data until February 2022</p>
<p><b>Course Access</b> Percent of unduplicated and students with exceptional needs scoring <i>Standard Not Met</i> on local assessments, receiving tutoring or tiered intervention.</p> <p>Source: Attendance in Programs</p>	<p>2020/21</p> <p>This program will be established and implemented in the 2021/22 school year</p>	<p>2021/22</p> <p>41.25% ELA 33.75% Math</p>

Metric	Baseline	Mid-Year
<b>Other Pupil Outcomes</b> Percent of 3 <sup>rd</sup> -8 <sup>th</sup> grade students scoring Standard Met on local assessment.  Source: Local Data (NWEA MAP)	Winter 2021  Reading 45% All 34% Low-income 34% Students with Disabilities 25% English learners  Math 31% All 7% Low-income 25% Students with Disabilities 0% English learners	Winter 2022  Reading 49% All 32% Low-income 31% Students with Disabilities 0% English learners  Math 42% All 35% Low-income 42% Students with Disabilities 12% English learners

## Actions

Action #	Title	Description	Mid-Year Update	Budgeted Expenditures	Expenditures to Date
1.1	Certificated Staff/PD	Provide rigorous instruction to all students by recruiting, retaining, and training/supporting skilled certificated staff. <ul style="list-style-type: none"> <li>PD: assessment system, writing, and learning loss/acceleration</li> </ul>	We have 10 classroom teachers. Our professional development activities have included: <ul style="list-style-type: none"> <li>ELD training</li> <li>AVT with Theresa Handcock</li> <li>FastBridge</li> <li>Writing – cross grade level for district writing assessments</li> </ul>	\$795,210	\$346,552.83
1.2	Instructional Materials	Provide standards-aligned instructional materials, supplemental resources, and supplies by purchasing science curriculum and consumables.	We have purchased: <ul style="list-style-type: none"> <li>CPM textbooks</li> <li>Wonders replacement books</li> <li>Handwriting Without Tears</li> <li>Zingy Learning</li> <li>Gr 3, <i>I Know It</i></li> </ul> We are piloting science curriculum now and will purchase at the end the year	\$37,794	\$3,972.81

Action #	Title	Description	Mid-Year Update	Budgeted Expenditures	Expenditures to Date
1.3	Support Academic Achievement	<p>Support the academic achievement of all students, with emphasis on unduplicated students (including Socioeconomically Disadvantaged, English learners, foster youth, and students with disabilities). Components include:</p> <ul style="list-style-type: none"> <li>○ A comprehensive assessment system (MAP &amp; FastBridge);</li> <li>○ Aides to provide and support targeted intervention and progress monitoring;</li> <li>○ Monthly data review; and</li> <li>○ A Director of Student Services to oversee assessment and intervention system, work with teachers to analyze data and plan instruction and intervention, and on-site coaching and professional development to ensure continuous improvement.</li> </ul>	<p>To support the academic achievement of all students we have:</p> <ul style="list-style-type: none"> <li>○ Purchased and implemented MAP and FastBridge assessments; continued use of Illuminate</li> <li>○ We have 7 aides directly supporting students for intervention/tutoring</li> <li>○ Monthly data review</li> <li>○ Director of Student Services oversees the assessment and intervention system (supervising aides who provide small group and one-on-one instruction; meets with teachers to review data; coaches teachers; and delivers PD</li> </ul>	\$231,597	\$113,068.30
1.4	Enrichment	<p>Maintain GATE program by providing students increased exposure to high-level thinking activities throughout the day, as well as after-school enrichment programs.</p> <ul style="list-style-type: none"> <li>○ Staff</li> <li>○ Destination Imagination fee and materials</li> </ul>	<p>We are offering afterschool GATE programs 2 times per month for 3<sup>rd</sup>-5<sup>th</sup> graders and 6<sup>th</sup>-8<sup>th</sup> graders. Topics vary based on interest survey of participants</p>	\$2,950	\$329.54

Goal #	Description
2	Ensure the school is a safe, engaging, and inclusive environment for students and their families so that all students achieve academic excellence, and families will be actively involved in the educational process.

Metric	Baseline	Mid-Year
<b>Basic Services</b> Facilities Inspection Tool Rating  Source: Facility Inspection Tool (FIT)	December 2020  Exemplary	October 2021  Exemplary
<b>Parental Involvement</b> Percent of parents who agree the school seeks parental involvement.  Source: Survey	February 2021  91.2% All 91% Low-income 100% Students with Exceptional Needs	We will not have this data until February 2022
<b>Pupil Engagement</b> Attendance Rate  Source: P2 Local Data	P2 2021  96.33%	As of December 31, 2021  92% (Local data)
<b>Pupil Engagement</b> Chronic Absenteeism Rate  Source: CA School Dashboard	Fall 2019  6.2% All 10.1% Low-income	EOY 2021  7.9% All (DateQuest) 16% Low-income (DateQuest)  December 31, 2021  15.9% All (Local data) 27% Low-income (Local data)
<b>Pupil Engagement</b> Middle School Dropout Rate  Source: CALPADS	EOY 2020  0%	EOY 2021  0%
<b>School Climate</b> Suspension Rate  Source: CA School Dashboard	Fall 2019  .5%	EOY 2021  0% (CALPADS)  2021/2022 as of Dec. 31, 2021  0% (Local data)
<b>School Climate</b> Expulsion Rate  Source: CALPADS	EOY 2020  0%	2021/22 as of December 31, 2021  0% (Local data)

Metric	Baseline	Mid-Year
<b>School Climate</b> Percent of parents, students, and staff who feel the school is safe.  Source: Survey	February 2021  Parents 97.1% Strongly Agree/Agree  Students 83% Usually 15% Sometimes  Staff We will collect baseline data.	We will not have this data until February 2022
<b>School Climate</b> Percent of parents and students who feel a sense of connectedness to the school. Source: Survey	February 2021  97% Parents 92% Students	We will not have this data until February 2022

## Actions

Action #	Title	Description	Mid-Year Update	Budgeted Expenditures	Expenditures to Date
2.1	Parent Engagement	Promote parent involvement through parent information opportunities, two-way communication systems, and engaging school events.	So far this year we have offered several school events including: <ul style="list-style-type: none"> <li>○ August 2021 – Back to School Night</li> <li>○ October 2021 – Pumpkin carving for a chance to win prizes and earn house points</li> <li>○ November 2021- Parent conference held through Zoom</li> <li>○ December 2021 – Virtual Winter Program</li> </ul> We communicate with families via Facebook, a monthly newsletter, text messages for reminders and information, website, and emails.	\$4,264	\$420.00

Action #	Title	Description	Mid-Year Update	Budgeted Expenditures	Expenditures to Date
2.2	Social-emotional Health	Support students' social and emotional health by providing a part-time school counselor and a screening program.	Part-time school counselor supports students and families, provides SEL curriculum in the form of lessons to teachers, teaches SEL lessons in classes. We have started using Kelvin, an SEL app. We will begin using the SEL screener Social, Academic, and Emotional Behavior Risk Screener (SAEBRS) in the spring	\$7,031	\$3,500
2.3	Transportation	Provide transportation services at no cost to families.	We provide transportation at no cost to families. We transport about 50 students per day.	\$95,610	\$49,130.87
2.4	Facilities	Continue to provide safe, well maintained facilities. <ul style="list-style-type: none"> <li>○ Personnel</li> <li>○ High speed internet</li> <li>○ Intercom</li> <li>○ Video surveillance</li> </ul>	<ul style="list-style-type: none"> <li>○ 3.25 FTE Custodian/Maintenance</li> <li>○ Installed high speed internet</li> <li>○ Wait until summer 2022 for intercom and video surveillance</li> </ul>	\$274,241	\$116,069.10

**Marcum-Illinois Union Elementary School District**  
2021-22 Budget Overview - Update

<b>Budgetary Impact of 2021 Budget Act on 2021-22 Adopted Budget</b>			
<b>Budget Item</b>	<b>Projected 2021-22 Budget Amount</b>	<b>Actual 2021-22 Budget Amount</b>	<b>Difference</b>
Total LCFF funds	\$1,848,381	\$1,839,713	(\$8,668)
LCFF supplemental and concentration grants	\$143,315	\$137,039	(\$6,276)
All other state funds	\$209,005	\$331,885	\$122,880
All local funds	\$606,564	\$603,813	(\$2,751)
All federal funds	\$33,635	\$66,124	\$32,489
Total projected revenue	\$2,697,585	\$2,841,535	\$143,950
Total budgeted general fund expenditures	\$2,871,081	\$2,923,653	\$52,572



# Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Marcum-Illinois Union Elementary School District	Maggie Irby Superintendent/Principal	maggiei@sutter.k12.ca.us 530-656-2407

California’s 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).

Marcum-Illinois included all funds provided through the Budget Act of 2021 in the adopted 2021–22 LCAP. Educational partner engagement can be found in the Stakeholder Engagement section of the [LCAP](#).

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

Marcum-Illinois does not receive Concentration Grant funds therefore this prompt does not apply.

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

The district makes every effort to ensure all educational partners are invited to provide input in the development of all plans. To obtain input we use a combination of paper and on-line surveys, meetings, and posting of drafts on our website. We meet with our Site Council/Parent Advisory Group to review draft plans prior to presentation to the Governing Board. That process was followed in the development of these plans. Detailed information can be found in the Stakeholder/Community Engagement section in the following plans: [LCAP](#) and [ESSER III](#).

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

Due to an influx of one-time funds for the 2021-22 school year, we will use our ESSER III funds (\$14,081) during the 2022-23 school year to continue after-school tutoring. Given the stressors of Covid on staff and employee shortages we anticipate challenges in staffing. If necessary, we will adjust our tutoring plan and focus on providing tutoring within the school day.

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.

Marcum-Illinois Union Elementary School District is coordinating the use of the fiscal resources to best meet the needs of the district, staff, students, and community. All plans are primarily focused on addressing the academic impact of lost instructional time, supporting the social-emotional needs of students, families, and staff, and safely operating the school and all funds are budgeted to address those areas of need.

## Instructions for the Supplement to the Annual Update for the 2021–22 Local Control and Accountability Plan Year

*For additional questions or technical assistance related to the completion of the Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan (LCAP), please contact the local county office of education (COE), or the California Department of Education’s (CDE’s) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at [lcff@cde.ca.gov](mailto:lcff@cde.ca.gov).*

### Introduction

California’s 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. Section 124(e) of Assembly Bill 130 requires LEAs to present an update on the Annual Update to the 2021–22 LCAP and Budget Overview for Parents on or before February 28, 2022, at a regularly scheduled meeting of the governing board or body of the LEA. At this meeting, the LEA must include all of the following:

- The Supplement to the Annual Update for the 2021–22 LCAP (2021–22 Supplement);
- All available mid-year outcome data related to metrics identified in the 2021–22 LCAP; and
- Mid-year expenditure and implementation data on all actions identified in the 2021–22 LCAP.

When reporting available mid-year outcome, expenditure, and implementation data, LEAs have flexibility to provide this information as best suits the local context, provided that it is succinct and contains a level of detail that is meaningful and accessible for the LEA’s educational partners.

The 2021–22 Supplement is considered part of the 2022–23 LCAP for the purposes of adoption, review, and approval, and must be included with the LCAP as follows:

- The 2022–23 Budget Overview for Parents
- The 2021–22 Supplement
- The 2022–23 LCAP
- The Action Tables for the 2022–23 LCAP
- The Instructions for the LCAP Template

As such, the 2021–22 Supplement will be submitted for review and approval as part of the LEA’s 2022–23 LCAP.

## Instructions

Respond to the following prompts, as required. In responding to these prompts, LEAs must, to the greatest extent practicable, provide succinct responses that contain a level of detail that will be meaningful and accessible for the LEA’s educational partners and the broader public and must, to the greatest extent practicable, use language that is understandable and accessible to parents.

In responding to these prompts, the LEA has flexibility to reference information provided in other planning documents. An LEA that chooses to reference information provided in other planning documents must identify the plan(s) being referenced, where the plan(s) are located (such as a link to a web page), and where in the plan the information being referenced may be found.

**Prompt 1:** *“A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).”*

In general, LEAs have flexibility in deciding what funds are included in the LCAP and to what extent those funds are included. If the LEA received funding through the Budget Act of 2021 that it would have typically included within its LCAP, identify the funds provided in the Budget Act of 2021 that were not included in the LCAP and provide a description of how the LEA has engaged its educational partners on the use of funds. If an LEA included the applicable funds in its adopted 2021–22 LCAP, provide this explanation.

**Prompt 2:** *“A description of how LEA used, or plans to use, the concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.”*

If LEA does not receive a concentration grant or the concentration grant add-on, provide this explanation.

Describe how the LEA is using, or plans to use, the concentration grant add-on funds received consistent with California *Education Code* Section 42238.02, as amended, to increase the number of certificated staff, classified staff, or both, including custodial staff, who provide direct services to students on school campuses with greater than 55 percent unduplicated pupil enrollment, as compared to schools with an enrollment of unduplicated students that is equal to or less than 55 percent.

In the event that the additional concentration grant add-on is not sufficient to increase the number of staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, describe how the LEA is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

**Prompt 3:** *“A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.”*

If the LEA did not receive one-time federal funding to support recovery from the COVID-19 pandemic and the impacts of distance learning on students, provide this explanation.

Describe how and when the LEA engaged its educational partners on the use of one-time federal funds it received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on students. See the COVID-19 Relief Funding Summary Sheet web page (<https://www.cde.ca.gov/fq/cr/relieffunds.asp>) for a listing of COVID-19 relief funding and the Federal Stimulus Funding web page (<https://www.cde.ca.gov/fq/cr/>) for additional information on these funds. The LEA is not required to describe engagement that has taken place related to state funds.

**Prompt 4:** “A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.”

If an LEA does not receive ESSER III funding, provide this explanation.

Describe the LEA’s implementation of its efforts to maintain the health and safety of students, educators, and other staff and ensure the continuity of services, as required by the federal American Rescue Plan Act of 2021, and its implementation of the federal Elementary and Secondary School Emergency Relief (ESSER) expenditure plan to date, including successes and challenges.

**Prompt 5:** “A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.”

Summarize how the LEA is using its fiscal resources received for the 2021–22 school year to implement the requirements of applicable plans in a manner that is aligned with the LEA’s 2021–22 LCAP. For purposes of responding to this prompt, “applicable plans” include the Safe Return to In-Person Instruction and Continuity of Services Plan and the ESSER III Expenditure Plan.

California Department of Education  
November 2021

**COVID-19 PREVENTION PROGRAM  
(CPP)**

**MARCUM-ILLINOIS  
UNION SCHOOL DISTRICT**

**Maggie Irby, Superintendent**

*January 2021, Updated, September 2021, Updated February 2022*

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## Introduction

The COVID-19 Prevention Program (CPP) addendum to the Injury and Illness Prevention Program (IIPP) has been developed and implemented pursuant to Emergency Temporary Standard in place for COVID-19 (California Code of Regulations (CCR), Title 8, section 3205(c)) updated June 17, 2021. This CPP is designed to control exposures to the SARS-CoV-2 virus that may occur in the workplace.

## Authority and Responsibility

The Marcum-Illinois Union Elementary School District Superintendent has overall authority and responsibility for implementing the provisions of this CPP in our workplace. In addition, all managers and supervisors are responsible for implementing and maintaining the CPP in their assigned work areas and for ensuring employees receive answers to questions about the program in a language they understand.

All employees are responsible for using safe work practices, following all directives, policies and procedures, and assisting in maintaining a safe work environment.

## System for Communicating

It is the district's goal to have effective two-way communication with employees, in a form they can readily understand. All employees of the district are to, without fear of reprisal, report to the Superintendent or designee any of the following:

Personal Symptoms or Exposure:

- To Whom: Employees are to report personal symptoms, exposures, and positive COVID-19 tests to Maggie Irby, Contact Tracer.
- How: Employees should report this information immediately by email or phone call.
- When: Immediately

Possible COVID-19 hazards at the workplace:

- To Whom: Hazards should be reported to the Superintendent or designee.
- How: Hazards can be reported in person, by email, or phone call.
- When: Immediately

Employees who are at a higher risk for complications as a result of COVID-19, can request a meeting with the Superintendent.

Employees wishing to access COVID-19 testing, where testing is not required, will be tested onsite, or will be directed to their health care provider or county health department. In the event the district is required to provide testing because of a workplace exposure or outbreak, the district will communicate the plan for providing testing and inform affected employees of the reason for the testing and the possible consequences of a positive test.

The district will follow the procedures in Section, *Identification and Evaluation of COVID-19 Hazards*, to identify and evaluate COVID-19 hazards. Employees will be notified of potential hazards, what is being done to control those hazards, and the district's COVID-19 policies and procedures through training and this CPP.

## Identification and Evaluation of COVID-19 Hazards

The following procedures will be put in place to identify and evaluate COVID-19 hazards:

- Conduct workplace-specific evaluations using the *Appendix A: Identification of COVID-19 Hazards* form.
- In accordance with the state health order, all staff must be vaccinated or they will need weekly COVID-19 testing.
- Document the vaccination status of our employees using *Appendix E: Documentation of Employee COVID-19 Vaccination Status*, which is maintained as a confidential medical record.
- Evaluate employees' potential workplace exposures to all persons at, or who may enter, this workplace.
- Develop COVID-19 policies and procedures to respond effectively and immediately to individuals at the workplace who are a COVID-19 case to prevent or reduce the risk of transmission in the workplace.



- Review applicable orders and general and industry-specific guidance from the State of California, Cal/OSHA, and the local health department related to COVID-19 hazards and prevention.
- Evaluate existing COVID-19 prevention controls and the need for different or additional controls.
- Conduct periodic inspections using the *Appendix B: COVID-19 Inspections form* as needed to identify unhealthy conditions, work practices, and work procedures related to COVID-19 and to ensure compliance with COVID-19 policies and procedures.

The district will monitor and review applicable orders and guidance from the State of California and the local health department related to COVID-19 hazards and prevention. Maggie Irby, Superintendent, is on a COVID-19 Task Force that meets with the Yuba/Sutter Public Health Department representative and other Sutter County Superintendents and receives updates on COVID cases, trends, updates to guidance, and other COVID-19 health impacts to schools.

### **Employee Participation**

Employees and their authorized employees' representatives are encouraged to participate in the identification and evaluation of COVID-19 hazards by notifying the Superintendent of any concerns of potential hazards so they can be addressed.

### **Employee Screening**

We screen our employees by requiring them to self-screen each day before entering campus according to CDPH guidelines.

### **Correction of COVID-19 Hazards**

Unsafe or unhealthy work conditions, practices or procedures will be documented on the *Appendix B: COVID-19 Inspections form* and corrected in a timely manner based on the severity of the hazards, as follows: The Superintendent will ensure that hazards identified on the inspection forms are addressed within one business day.

### **Control of COVID-19 Hazards**

#### **Cleaning and Disinfecting**

Marcum-Illinois has established routine schedules and ensures there are adequate supplies to clean and disinfect common surfaces and objects in the workplace. This includes, but is not limited to, technology devices, office equipment, counters, tables, desks, chairs, door handles, drinking fountains, restroom and bathroom surfaces, and buses. Sanitizing wipes and/or sprays will be available for staff to wipe high touch surfaces before use.

The process of disinfecting includes providing disinfecting products that are EPA approved for use against the virus that causes COVID-19 and following the manufacturer's instructions for all cleaning and disinfection products (e.g., safety requirements, PPE, concentration, contact time). The district will inform employees and authorized employee representatives of cleaning and disinfection protocols, including the planned frequency and scope of regular cleaning and disinfection.

Should there be a COVID-19 case in the workplace, the following procedures will be implemented:

- Areas will be closed off and not used before cleaning and disinfecting.
  - To reduce risk of exposure, custodial staff will wait 24 hours before cleaning and disinfecting.
  - If it is not possible to wait 24 hours, staff will wait as long as feasible before cleaning and disinfecting.
- Open outside doors and windows to increase air circulation in the area.
- Clean and disinfect all areas and equipment used by the sick person.
- Wash hands immediately after removing gloves and after contact with a sick person.
- If more than 7 days since the sick person visited or used the facility, additional cleaning and disinfection is

- not necessary.
- Continue routine cleaning and disinfecting

### **Engineering Controls**

The district will evaluate whether it is necessary to implement barriers during an outbreak (3 or more cases in an exposed group of employees). The district will implement barriers during a major outbreak (20 or more cases in an exposed group of employees).

For indoor locations, the district has evaluated how to maximize the quantity of outdoor air and whether it is possible to increase filtration efficiency to the highest level compatible with the existing ventilation system. Marcum-Illinois offers air purifying machines for workspaces and classrooms and maintains the ventilation systems by regularly replacing all filters and servicing any needed repairs.

### **Face Coverings**

The district provides clean, undamaged face coverings and ensures they are properly worn over the nose and mouth when indoors, and where required by orders from the California Department of Public Health (CDPH) or local health department. The district ensures the face coverings used in the workplace meet the section 3205(b)(8) "face covering" definition and requirements, and the 3205(b)(9) definition of "fully vaccinated" is applied. Face coverings are not required outdoors (except during outbreaks) regardless of vaccination status. Workers will be trained on CDPH recommendations for outdoor use of face coverings. Information will be provided to staff on [proper use, removal, and washing of cloth face coverings.](#)

The following are exceptions to the requirement to wear face coverings indoors:

- When an employee is alone in a room or vehicle.
- While eating and drinking.
- Employees exempted from wearing face coverings due to a medical condition, mental health condition, or disability shall wear an effective non-restrictive alternative, such as a face shield with a drape on the bottom, if their condition or disability permits it. These employees will meet with the Superintendent to determine reasonable accommodations.
- Per CDPH guidance, teachers may use face shields with a drape, to enable students to see their faces and to avoid potential barriers to phonological instruction.
- Specific tasks that cannot feasibly be performed with a face covering. This exception is limited to the time in which such tasks are being performed.

COVID-19 testing cannot be used as an alternative to face coverings when face coverings are otherwise required.

The district will not prevent any employee from wearing a face covering when not required, unless it would create a safety hazard, such as interfering with the safe operation of equipment. The district will not retaliate against employees for wearing face coverings.

The district has posted signs to communicate to non-employees the face coverings requirements on the premises. In an effort to minimize employee exposure to COVID-19 hazards originating from any person not wearing a face covering, the campus is closed to all non-essential personnel and visitors and face coverings are required by *ALL* adults and students TK-8<sup>th</sup> grade.

### **Hand Sanitizing**

In order to implement effective hand sanitizing procedures, we:

- Evaluated handwashing facilities.
- Added additional handwashing facilities.
- Encourage and allow time for employee handwashing.
- Provide employees with an effective hand sanitizer, and prohibit hand sanitizers that contain methanol (i.e., methyl alcohol).
- Encourage employees to wash their hands for at least 20 seconds each time.

## Physical Distancing

As stated by the CDPH, “Recent evidence indicates that in-person instruction can occur safely without minimum physical distancing requirements when other mitigation strategies (e.g., masking) are implemented.” However, we encourage the use of distancing as much as practicable to decrease unnecessary close proximity, while still allowing for a full in-person instructional program. The district will evaluate whether it is necessary to implement physical distancing during an outbreak (3 or more cases in an exposed group of employees). The district will implement physical distancing during a major outbreak (20 or more cases in an exposed group of employees).

Where possible, we encourage physical distancing in the workplace by:

- Increasing physical space between employees by modifying the workspace and/or the use of physical barriers such as partitions.
- Avoiding shared workspaces (desks, offices, and cubicles) and work items (phones, computers, other work tools, and equipment) when possible. If they must be shared, cleaning and disinfecting shared workspaces and work items before and after use.
- Reducing visitors on campus.
- Increasing seating and adding outdoor seating when practicable in staff break room areas.
- Holding meetings in well ventilated spaces with as much spacing as practicable if a virtual meeting is not feasible.

## Personal Protective Equipment (PPE) Used to Control Employees’ Exposure to COVID-19

The district will evaluate the need for PPE (such as glove, goggles, and face shields) as required by section 3380, and provide and ensure use of such PPE as needed. If the district identifies COVID-19 as a workplace hazard, it will select and provide exposed employees with properly fitting PPE that will effectively protect employees.

Unvaccinated employees will be provided approved respirators for voluntary use when working indoors or in a vehicle with others upon request to the superintendent. If there is a major outbreak, the district will provide any employee in the exposed group with approved respirators for voluntary use. Once requested, respirators will be provided as soon as possible and will be the appropriate size. We provide and ensure use of respirators in compliance with section 5144 when deemed necessary by Cal/OSHA.

## Investigating and Responding to COVID-19 Cases

Procedure to investigate COVID-19 cases in the workplace:

- *Appendix C: Investigating COVID-19 Cases* form will be used to verify COVID-19 case status, receive information regarding COVID-19 test results and onset of COVID-19 symptoms, and identify and record COVID-19 cases. The contact tracer will:
  - Determine the day and time the COVID-19 case was last present and, to the extent possible, the date of the positive COVID-19 test(s), diagnosis, and/or the date the onset of COVID-19 symptoms, if any were experienced.
  - Evaluate the activities of the COVID-19 case and all locations at the workplace which may have been visited during the high-risk exposure period, to determine potential exposures.

Response to a COVID-19 case in the workplace:

- Maggie Irby, Superintendent, conducts interviews and completes required reporting.
- The district gives written notice of the potential COVID-19 exposure, within one business day, in a way that does not reveal any personal identifying information of the COVID-19 case, to the following:
  - All employees who may have had COVID-19 exposure and their authorized representatives.
  - Independent contractors and other employers present at the workplace during the high-risk exposure period.
- The district offers COVID-19 testing at no cost to employees during their working hours to:
  - Symptomatic unvaccinated employees, regardless of whether there is a known exposure
  - All employees, regardless of vaccination status, who have had close contact with a COVID-19 case, except for recently recovered employees.

- All employees except for recently recovered employees, regardless of vaccination status, in an outbreak (weekly) or a major outbreak (twice a week).
- When following CDPH’s Isolation and Quarantine Guidance to keep employees working or return them sooner, if tested.
- The district will provide employees with the information on benefits
- After each incident, the leadership team, investigates whether any workplace conditions could have contributed to the risk of COVID-19 exposure and what could be done to reduce exposure to COVID-19 hazards.

All personally identifying information regarding COVID-19 cases or persons with COVID-19 symptoms shall be kept confidential. All COVID-19 testing, or related medical services provided by the employer shall be provided in a manner that ensures the confidentiality of employees. All Employee medical records are kept confidential and are not disclosed or reported without the employee's express written consent to any person within or outside the workplace.

### **Exclusion of COVID-19 Cases and Employees who had a Close Contact**

The district will follow the latest CDPH, Sutter County Public Health, and Cal/OSHA guidance.

For employees excluded from work, the district shall continue and maintain an employee’s earnings, seniority, and all other employee rights and benefits as if the employee had not been removed from their job. The district may use employer-provided employee sick leave benefits for this purpose and consider benefit payments from public sources in determining how to maintain earnings, rights and benefits, where permitted by law and when not covered by workers’ compensation. This does not limit any other applicable law, employer policy, or collective bargaining agreement that provides for greater protections. At the time of exclusion, the district shall provide the employee with information on available benefits as described in Training and Instructions and Exclusion of COVID-19 Cases.

### **Return-to-Work Criteria**

The district will follow the latest CDPH, Sutter County Public Health, and Cal/OSHA guidance.

#### Close Contact:

The district will follow CDPH, Sutter County Public Health, and Cal/OSHA guidance.

A negative COVID-19 test shall not be required for an employee to return to work once the requirements for “cases with symptoms” or “cases who tested positive but never developed symptoms” (above) have been met. If an order to isolate or quarantine an employee is issued by a local or state health official the employee shall not return to work until the period of isolation or quarantine is completed or the order is lifted. When employees who are fully vaccinated, regardless of whether they are booster-eligible or boosted, cannot be tested as required by CDPH quarantine guidance, those employees must wear face coverings and physically distance (six feet) from others for 14 days if they are to be exempted from the exclusion requirements after a close contact.

### **Reporting, Recordkeeping, and Access**

It is district policy to:

- Report information about COVID-19 cases at the workplace to the local health department whenever required by law, and provide any related information requested by the local health department.
- Report immediately to Cal/OSHA any COVID-19-related serious illnesses or death, as defined under CCR Title 8 section 330(h), of an employee occurring in our place of employment or in connection with any employment.
- Maintain records of the steps taken to implement our written COVID-19 Prevention Program in accordance with CCR Title 8 section 3203(b).
- Make the written COVID-19 Prevention Program available at the workplace to employees, authorized

employee representatives, and to representatives of Cal/OSHA immediately upon request.

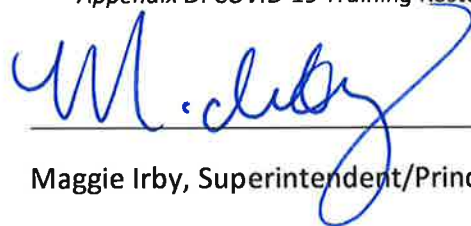
- Use the *Appendix C: Investigating COVID-19 Cases* form to keep a record of and track all COVID-19 cases. The information will be made available to employees, authorized employee representatives, or as otherwise required by law, with personal identifying information removed.

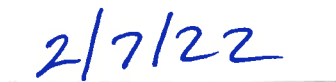
## Training and Instruction

The district training may consist of reviewing written documentation, online video trainings and/or acknowledge receipt of the District's COVID-19 Prevention Plan (CPP). Training and instruction will include:

- The district's COVID-19 policies and procedures to protect employees from COVID-19 hazards, and how to participate in the identification and evaluation of COVID-19 hazards.
- Information regarding COVID-19-related benefits to which the employee may be entitled under applicable federal, state, or local laws.
- The fact that:
  - COVID-19 is an infectious disease that can be spread through the air.
  - COVID-19 may be transmitted when a person touches a contaminated object and then touches their eyes, nose, or mouth.
  - An infectious person may have no symptoms.
- The right of employees that are not fully vaccinated to request a respirator for voluntary use, without fear of retaliation, and our policies for providing the respirators. Employees voluntarily using respirators will be trained according to section 5144(c)(2) requirements:
  - How to properly wear them.
  - How to perform a seal check according to the manufacturer's instructions each time a respirator is worn, and the fact that facial hair can interfere with a seal.
- The fact that particles containing the virus can travel more than six feet, especially indoors, so physical distancing must be combined with face coverings and hand hygiene, to be effective.
- The importance of frequent hand washing with soap and water for at least 20 seconds and using hand sanitizer when employees do not have immediate access to a sink or hand washing facility, and that hand sanitizer does not work if the hands are soiled.
- Proper use of face coverings and the fact that face coverings are not respiratory protective equipment. Since COVID-19 is an airborne disease, N95s and more protective respirators protect the users from airborne disease, while face coverings primarily protect people around the user.
  - The conditions where face coverings must be worn at the workplace.
  - That face coverings are additionally recommended outdoors for people who are not fully vaccinated if six feet of distance cannot be maintained.
  - Employees can request face coverings and can wear them at work regardless of vaccination status and without fear of retaliation.
- COVID-19 symptoms, and the importance of obtaining a COVID-19 test and not coming to work if the employee has COVID-19 symptoms.
- Information on our COVID-19 policies and how to access COVID-19 testing and vaccination, and the fact that vaccination is effective at preventing COVID-19, protecting against both transmission and serious illness or death.

*Appendix D: COVID-19 Training Roster* will be used to document this training.

  
 \_\_\_\_\_  
 Maggie Irby, Superintendent/Principal

  
 \_\_\_\_\_  
 Date

## Appendix A: Identification of COVID-19 Hazards

*All persons, regardless of symptoms or negative COVID-19 test results, will be considered potentially infectious. Particular attention will be paid to areas where people may congregate or come in contact with one another, regardless of whether employees are performing an assigned work task or not. For example: meetings, entrances, bathrooms, hallways, aisles, walkways, elevators, break or eating areas, cool-down areas, and waiting areas.*

*Evaluation of potential workplace exposure will be to all persons at the workplace or who may enter the workplace, including coworkers, employees of other entities, members of the public, customers or clients, and independent contractors. We will consider how employees and other persons enter, leave, and travel through the workplace, in addition to addressing fixed work locations.*

**Person conducting the evaluation:** \_\_\_\_\_

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

**Name(s) of employee and authorized employee representative that participated:** \_\_\_\_\_

Interaction, area, activity, work task, process, equipment and material that potentially exposes employees to COVID-19 hazards	Places and times	Potential for COVID-19 exposures and employees affected, including members of the public and employees of other employers	Existing and/or additional COVID-19 prevention controls, including barriers, partitions and ventilation

*Make copies as needed*

### Appendix B: COVID-19 Inspections

Date: \_\_\_\_\_ Work location evaluated: \_\_\_\_\_

Name of person conducting the inspection: \_\_\_\_\_

Exposure Controls	Status	Notes	Person Assigned to Correct	Date Corrected
<b>Engineering</b>				
Barriers/partitions				
Ventilation (amount of fresh air and filtration maximized)				
<b>Administrative</b>				
Physical distancing				
Surface cleaning and disinfection (frequently enough and adequate supplies)				
Hand washing facilities (adequate numbers and supplies)				
Disinfecting and hand sanitizing solutions being used according to manufacturer instructions				
Face coverings (cleaned sufficiently often)				
Gloves				
Face shields/goggles				

*Make copies as needed*

### Appendix C: Investigating COVID-19 Cases

All personal identifying information of COVID-19 cases or symptoms will be kept confidential. All COVID-19 testing or related medical services provided by us will be provided in a manner that ensures the confidentiality of employees, with the exception of unredacted information on COVID-19 cases that will be provided immediately upon request to the local health department, CDPH, Cal/OSHA, the National Institute for Occupational Safety and Health (NIOSH), or as otherwise required by law.

All employees' medical records will also be kept confidential and not disclosed or reported without the employee's express written consent to any person within or outside the workplace, with the following exceptions: (1) Unredacted medical records provided to the local health department, CDPH, Cal/OSHA, NIOSH, or as otherwise required by law immediately upon request; and (2) Records that do not contain individually identifiable medical information or from which individually identifiable medical information has been removed.

Staff involved in investigation:		Date investigation initiated:	
----------------------------------	--	-------------------------------	--

Employee name:		Was COVID-19 test offered?	
Date of the positive or negative test and/or diagnosis:		Occupation/Location employee worked:	

Date and time the COVID-19 case was last present in the workplace:		Workplace locations that may have been visited by the COVID-19 case during the high-risk exposure period	
Who may have been exposed			



Notice given (within one business day, in a way that does not reveal any personal identifying information of the COVID-19 case) of the potential COVID-19 exposure to:			
All employees who may have had COVID-19 exposure and their authorized representatives.	Date:		
	Names of employees that were notified:		
Independent contractors and other employers present at the workplace during the high-risk exposure period.	Date:		
	Names of individuals that were notified:		
What were the workplace conditions that could have contributed to the risk of COVID-19 exposure?		What could be done to reduce exposure to COVID-19?	
Was local health department notified?		Date:	





## Appendix F: Multiple COVID-19 Infections and COVID-19 Outbreaks

*Appendix E applies only if the workplace is identified by a local health department as the location of a COVID-19 outbreak, or there are three or more COVID-19 cases in the workplace within a 14-day period (see [3205.1](#) for details).*

This section of CPP will stay in effect until there are no new COVID-19 cases detected in our workplace for a 14-day period.

### COVID-19 Testing

The district will provide COVID-19 testing to all employees, during paid time, in the exposed workplace except for:

- Employees who were not present during the period of an outbreak identified by a local health department or the relevant 14-day period.
- Employees who were fully vaccinated before the multiple infections or outbreak and who do not have symptoms.
- COVID-19 cases who did not develop symptoms after returning to work pursuant to our return-to-work criteria, no testing is required for 90 days after the initial onset of symptoms or, for COVID-19 cases who never developed symptoms, 90 days after the first positive test.

COVID-19 testing consists of the following:

- All employees in the exposed workplace will be immediately tested and then tested again one week later. Negative COVID-19 test results of employees with COVID-19 exposure will not impact the duration of any quarantine period required by, or orders issued by, the local health department.
- After the first two COVID-19 tests, the district will continue to provide COVID-19 testing of employees who remain at the workplace at least once per week, or more frequently if recommended by the local health department, until there are no new COVID-19 cases detected in the workplace for a 14-day period.
- Additional testing will be provided when deemed necessary by Cal/OSHA.

We continue to comply with the applicable elements of our CPP, as well as the following:

1. Employees in the exposed group wear face coverings when indoors, or when outdoors and less than six feet apart (unless one of the face-covering exceptions indicated in our CPP apply).
2. We give notice to employees in the exposed group of their right to request a respirator for voluntary use if they are not fully vaccinated.
3. We evaluate whether to implement physical distancing of at least six feet between persons, or where six feet of physical distancing is not feasible, the need for use of cleanable solid partitions of sufficient size to reduce COVID-19 transmission.

### Exclusion of COVID-19 Cases

Marcum-Illinois will ensure COVID-19 cases and employees who had COVID-19 exposure are excluded from the workplace in accordance with our CPP *Exclusion of COVID-19 Cases* and *Return to Work Criteria* requirements, and local health officer orders if applicable.

### Investigation of Workplace COVID-19 illness

The district will immediately investigate and determine possible workplace-related factors that contributed to the COVID-19 outbreak in accordance with our CPP *Investigating and Responding to COVID-19 Cases*.

### COVID-19 Investigation, Review, and Hazard Correction

In addition to our CPP *Identification and Evaluation of COVID-19 Hazards* and *Correction of COVID-19 Hazards*, we will immediately perform a review of potentially relevant COVID-19 policies, procedures, and controls and implement changes as needed to prevent further spread of COVID-19.

The investigation and review will be documented and include:

- Investigation of new or unabated COVID-19 hazards including:

- Leave policies and practices and whether employees are discouraged from remaining home when sick.
- COVID-19 testing policies.
- Insufficient outdoor air.
- Insufficient air filtration.
- Lack of physical distancing.
- Updating the review:
  - Every thirty days that the outbreak continues.
  - In response to new information or to new or previously unrecognized COVID-19 hazards.
  - When otherwise necessary.
- Implementing changes to reduce the transmission of COVID-19 based on the investigation and review. We will consider:
  - Moving indoor tasks outdoors or having them performed remotely.
  - Increasing outdoor air supply when work is done indoors.
  - Improving air filtration.
  - Increasing physical distancing as much as possible.
  - Requiring respiratory protection in compliance with section 5144..

### **Buildings or Structures with Mechanical Ventilation**

The district will filter recirculated air with Minimum Efficiency Reporting Value (MERV) 13 or higher efficiency filters, if compatible with the ventilation system. If MERV-13 or higher filters are not compatible, filters with the highest compatible filtering efficiency will be used. We will also evaluate whether portable or mounted High Efficiency Particulate Air (HEPA) filtration units or other air cleaning systems would reduce the risk of transmission and, if so, implement their use to the degree feasible.

### **Notifications to the Local Health Department**

Immediately, but no longer than 48 hours after learning of three or more COVID-19 cases in the workplace, the district's contract tracer will contact the local health department for guidance on preventing the further spread of COVID-19 within the workplace.

The district will provide to the local health department the total number of COVID-19 cases and for each COVID-19 case, the name, contact information, occupation, workplace location, business address, the hospitalization and/or fatality status, and North American Industry Classification System code of the workplace of the COVID-19 case, and any other information requested by the local health department. We will continue to give notice to the local health department of any subsequent COVID-19 cases at our workplace.

# 2021-2022 Statement of Economic Interests



## Form 700

A Public Document

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### ***Helpful Resources***

- Video Tutorials
- Reference Pamphlet
- Excel Version
- FAQs
- Gift and Travel Fact Sheet for State and Local Officials

## **California Fair Political Practices Commission**

1102 Q Street, Suite 3000 • Sacramento, CA 95811

Email Advice: [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)

Toll-free advice line: 1 (866) ASK-FPPC • 1 (866) 275-3772

Telephone: (916) 322-5660 • Website: [www.fppc.ca.gov](http://www.fppc.ca.gov)

## Quick Start Guide

Detailed instructions begin on page 3.

### WHEN IS THE ANNUAL STATEMENT DUE?

- March 1 – Elected State Officers, Judges and Court Commissioners, State Board and Commission members listed in Government Code Section 87200
- April 1 – Most other filers

### WHERE DO I FILE?

Most people file the Form 700 with their agency. If you're not sure where to file your Form 700, contact your filing officer or the person who asked you to complete it.

### ITEMS TO NOTE!

- The Form 700 is a public document.
- Only filers serving in active military duty may receive an extension on the filing deadline.
- You must also report interests held by your spouse or registered domestic partner.
- Your agency's conflict of interest code will help you to complete the Form 700. You are encouraged to get your conflict of interest code from the person who asked you to complete the Form 700.

### NOTHING TO REPORT?

Mark the "No reportable interests" box on Part 4 of the Cover Page, and submit only the signed Cover Page. Please review each schedule carefully!

Schedule	Common Reportable Interests	Common Non-Reportable Interests
A-1: Investments	Stocks, including those held in an IRA or 401K. Each stock must be listed.	Insurance policies, government bonds, diversified mutual funds, funds similar to diversified mutual funds.
A-2: Business Entities/Trusts	Business entities, sole proprietorships, partnerships, LLCs, corporations and trusts. (e.g., Form 1099 filers).	Savings and checking accounts, and annuities.
B: Real Property	Rental property in filer's jurisdiction, or within two miles of the boundaries of the jurisdiction.	A residence used exclusively as a personal residence (such as a home or vacation property).
C: Income	Non-governmental salaries. Note that filers are required to report only half of their spouse's or partner's salary.	Governmental salary (from school district, for example).
D: Gifts	Gifts from businesses, vendors, or other contractors (meals, tickets, etc.).	Gifts from family members.
E: Travel Payments	Travel payments from third parties (not your employer).	Travel paid by your government agency.

**Note:** Like reportable interests, non-reportable interests may also create conflicts of interest and could be grounds for disqualification from certain decisions.

### QUESTIONS?

- [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)
- (866) 275-3772 Mon-Thurs, 9-11:30 a.m.

### E-FILING ISSUES?

- If using your agency's system, please contact technical support at your agency.
- If using FPPC's e-filing system, write to [form700@fppc.ca.gov](mailto:form700@fppc.ca.gov).

## What's New

### Gift Limit Increase

The gift limit increased to **\$520** for calendar years **2021** and **2022**. The gift limit in 2020 was **\$500**.

### Who must file:

- Elected and appointed officials and candidates listed in Government Code Section 87200
- Employees, appointed officials, and consultants filing pursuant to a conflict of interest code ("code filers"). **Obtain your disclosure categories, which describe the interests you must report, from your agency;** they are not part of the Form 700
- Candidates running for local elective offices that are designated in a conflict of interest code (e.g., county sheriffs, city clerks, school board trustees, and water board members)

#### Exception:

- Candidates for a county central committee are not required to file the Form 700
- Employees in newly created positions of existing agencies

For more information, see Reference Pamphlet, page 3, at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### Where to file:

#### 87200 Filers

State offices	⇒	Your agency
Judicial offices	⇒	The clerk of your court
Retired Judges	⇒	Directly with FPPC
County offices	⇒	Your county filing official
City offices	⇒	Your city clerk
Multi-County offices	⇒	Your agency

#### Code Filers — State and Local Officials, Employees, and Consultants Designated in a Conflict of Interest

**Code:** File with your agency, board, or commission unless otherwise specified in your agency's code (e.g., Legislative staff files directly with FPPC). In most cases, the agency, board, or commission will retain the statements.

**Members of Newly Created Boards and Commissions:** File with your agency or with your agency's code reviewing body pursuant to Regulation 18754.

#### Employees in Newly Created Positions of Existing Agencies:

File with your agency or with your agency's code reviewing body. (See Reference Pamphlet, page 3.)

Candidates file as follow:

State offices, Judicial offices and multi-county offices	⇒	County elections official with whom you file your declaration of candidacy
County offices	⇒	County elections official
City offices	⇒	City Clerk
Public Employee's Retirement System (CalPERS)	⇒	CalPERS
State Teacher's Retirement Board (CalSTRS)	⇒	CalSTRS

### How to file:

The Form 700 is available at [www.fppc.ca.gov](http://www.fppc.ca.gov). Form 700 schedules are also available in Excel format. Each Statement must have a handwritten "wet" signature or "secure electronic signature," meaning either (1) a signature submitted using an approved electronic filing system or (2) if permitted by the filing officer, a digital signature submitted via the filer's agency email address. (See Regulations 18104 and 18757.) Companies such as Adobe and DocuSign offer digital signature services. All statements are signed under the penalty of perjury and must be verified by the filer. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

### When to file:

#### Annual Statements

##### ⇒ March 1, 2022

- Elected State Officers
- Judges and Court Commissioners
- State Board and State Commission Members listed in Government Code Section 87200

##### ⇒ April 1, 2022

- Most other filers

Individuals filing under conflict of interest codes in city and county jurisdictions should verify the annual filing date with their filing official or filing officer.

Statements postmarked by the filing deadline are considered filed on time.

Statements of 30 pages or less may be emailed or faxed by the deadline as long as the originally signed paper version is sent by first class mail to the filing official within 24 hours.

#### Assuming Office and Leaving Office Statements

Most filers file within 30 days of assuming or leaving office or within 30 days of the effective date of a newly adopted or amended conflict of interest code.

#### Exception:

If you assumed office between October 1, 2021, and December 31, 2021, and filed an assuming office statement, you are not required to file an annual statement until March 1, 2023, or April 1, 2023, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2022. (See Reference Pamphlet, page 6, for additional exceptions.)

#### Candidate Statements

File no later than the final filing date for the declaration of candidacy or nomination documents. A candidate statement is not required if you filed an assuming office or annual statement for the same jurisdiction within 60 days before filing a declaration of candidacy or other nomination documents.

#### Late Statements

**There is no provision for filing deadline extensions unless the filer is serving in active military duty. (See page 19 for information on penalties and fines.)**

#### Amendments

Statements may be amended at any time. You are only required to amend the schedule that needs to be revised. It is not necessary to amend the entire filed form. Obtain amendment schedules at [www.fppc.ca.gov](http://www.fppc.ca.gov).



## Types of Statements

### Assuming Office Statement:

If you are a newly appointed official or are newly employed in a position designated, or that will be designated, in a state or local agency's conflict of interest code, your assuming office date is the date you were sworn in or otherwise authorized to serve in the position. If you are a newly elected official, your assuming office date is the date you were sworn in.

- Report: Investments, interests in real property, and business positions held on the date you assumed the office or position must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date you assumed the office or position.

For positions subject to confirmation by the State Senate or the Commission on Judicial Appointments, your assuming office date is the date you were appointed or nominated to the position.

- Example: Maria Lopez was nominated by the Governor to serve on a state agency board that is subject to state Senate confirmation. The assuming office date is the date Maria's nomination is submitted to the Senate. Maria must report investments, interests in real property, and business positions she holds on that date, and income (including loans, gifts, and travel payments) received during the 12 months prior to that date.

If your office or position has been added to a newly adopted or newly amended conflict of interest code, use the effective date of the code or amendment, whichever is applicable.

- Report: Investments, interests in real property, and business positions held on the effective date of the code or amendment must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the effective date of the code or amendment.

### Annual Statement:

Generally, the period covered is January 1, 2021, through December 31, 2021. If the period covered by the statement is different than January 1, 2021, through December 31, 2021, (for example, you assumed office between October 1, 2020, and December 31, 2020 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2021.

- If your disclosure category changes during a reporting period, disclose under the old category until the effective date of the conflict of interest code amendment and disclose under the new disclosure category through the end of the reporting period.

### Leaving Office Statement:

Generally, the period covered is January 1, 2021, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2021, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2020, and December 31, 2020, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2021.

### Candidate Statement:

If you are filing a statement in connection with your candidacy for state or local office, investments, interests in real property, and business positions held on the date of filing your declaration of candidacy must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date of filing your declaration of candidacy is reportable. Do not change the preprinted dates on Schedules A-1, A-2, and B.

Candidates running for local elective offices (e.g., county sheriffs, city clerks, school board trustees, or water district board members) must file candidate statements, as required by the conflict of interest code for the elected position. The code may be obtained from the agency of the elected position.

### Amendments:

If you discover errors or omissions on any statement, file an amendment as soon as possible. You are only required to amend the schedule that needs to be revised; it is not necessary to refile the entire form. Obtain amendment schedules from the FPPC website at [www.fppc.ca.gov](http://www.fppc.ca.gov).

**Note:** Once you file your statement, you may not withdraw it. All changes must be noted on amendment schedules.

### Expanded Statement:

If you hold multiple positions subject to reporting requirements, you may be able to file an expanded statement for each position, rather than a separate and distinct statement for each position. The expanded statement must cover all reportable interests for all jurisdictions and list all positions for which it is filed. The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1

**STATEMENT OF ECONOMIC INTERESTS**  
**COVER PAGE**  
*A PUBLIC DOCUMENT*

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)

**1. Office, Agency, or Court**

Agency Name (Do not use acronyms)

Division, Board, Department, District, if applicable Your Position

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: Position:

**2. Jurisdiction of Office (Check at least one box)**

State Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)  
Multi-County County of  
City of Other

**3. Type of Statement (Check at least one box)**

Annual: The period covered is January 1, 2021, through December 31, 2021. Leaving Office: Date Left (Check one circle.)  
-or- The period covered is through December 31, 2021. The period covered is January 1, 2021, through the date of leaving office.  
Assuming Office: Date assumed -or- The period covered is through the date of leaving office.  
Candidate: Date of Election and office sought, if different than Part 1:

**4. Schedule Summary (must complete) ► Total number of pages including this cover page:**

**Schedules attached**

- Schedule A-1 - Investments – schedule attached
- Schedule A-2 - Investments – schedule attached
- Schedule B - Real Property – schedule attached
- Schedule C - Income, Loans, & Business Positions – schedule attached
- Schedule D - Income – Gifts – schedule attached
- Schedule E - Income – Gifts – Travel Payments – schedule attached

-or- **None - No reportable interests on any schedule**

**5. Verification**

MAILING ADDRESS STREET CITY STATE ZIP CODE  
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER EMAIL ADDRESS  
( )

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed Signature  
(month, day, year) (File the originally signed paper statement with your filing official.)

Enter your name, mailing address, and daytime telephone number in the spaces provided. **Because the Form 700 is a public document, you may list your business/office address instead of your home address.**

### Part 1. Office, Agency, or Court

- Enter the name of the office sought or held, or the agency or court. Consultants must enter the public agency name rather than their private firm's name. (Examples: State Assembly; Board of Supervisors; Office of the Mayor; Department of Finance; Hope County Superior Court).
- Indicate the name of your division, board, or district, if applicable. (Examples: Division of Waste Management; Board of Accountancy; District 45). **Do not use acronyms.**
- Enter your position title. (Examples: Director; Chief Counsel; City Council Member; Staff Services Analyst).
- If you hold multiple positions (i.e., a city council member who also is a member of a county board or commission) you may be required to file separate and distinct statements with each agency. To simplify your filing obligations, in some cases you may instead complete a single expanded statement and file it with each agency.
  - The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1. To file an expanded statement for multiple positions, enter the name of each agency with which you are required to file and your position title with each agency in the space provided. **Do not use acronyms.** Attach an additional sheet if necessary. Complete one statement disclosing all reportable interests for all jurisdictions. Then file the expanded statement with each agency as directed by Regulation 18723.1(c).

If you assume or leave a position after a filing deadline, you must complete a separate statement. For example, a city council member who assumes a position with a county special district after the April annual filing deadline must file a separate assuming office statement. In subsequent years, the city council member may expand their annual filing to include both positions.

#### Example:

Brian Bourne is a city council member for the City of Lincoln and a board member for the Camp Far West Irrigation District – a multi-county agency that covers the Counties of Placer and Yuba. The City is located within Placer County. Brian may complete one expanded statement to disclose all reportable interests for both offices and list both positions on the Cover Page. Brian will file the expanded statement with each the City and the District as directed by Regulation 18723.1(c).

### Part 2. Jurisdiction of Office

- Check the box indicating the jurisdiction of your agency and, if applicable, identify the jurisdiction. Judges, judicial candidates, and court commissioners have statewide jurisdiction. All other filers should review the Reference Pamphlet, page 13, to determine their jurisdiction.
- If your agency is a multi-county office, list each county in which your agency has jurisdiction.

- If your agency is not a state office, court, county office, city office, or multi-county office (e.g., school districts, special districts and JPAs), check the “other” box and enter the county or city in which the agency has jurisdiction.

#### Example:

This filer is a member of a water district board with jurisdiction in portions of Yuba and Sutter Counties.

<b>1. Office, Agency, or Court</b>	
Agency Name (Do not use acronyms) Feather River Irrigation District	
Division, Board, Department, District, if applicable N/A	Your Position Board Member
▶ If filing for multiple positions, list below or on an attachment. (Do not use acronyms)	
Agency: N/A	Position: _____
<b>2. Jurisdiction of Office (Check at least one box)</b>	
<input type="checkbox"/> State	<input type="checkbox"/> Judge or Court Commissioner (Statewide Jurisdiction)
<input checked="" type="checkbox"/> Multi-County Yuba & Sutter Counties	<input type="checkbox"/> County of _____
<input type="checkbox"/> City of _____	<input type="checkbox"/> Other _____

### Part 3. Type of Statement

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2021 annual statement, **do not** change the pre-printed dates to reflect 2022. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2022, through December 31, 2022, will be disclosed on your statement filed in 2023. See Reference Pamphlet, page 4.

Combining Statements: Certain types of statements for the same position may be combined. For example, if you leave office after January 1, but before the deadline for filing your annual statement, you may combine your annual and leaving office statements. File by the earliest deadline. Consult your filing officer or the FPPC.

### Part 4. Schedule Summary

- Complete the Schedule Summary after you have reviewed each schedule to determine if you have reportable interests.
- Enter the total number of completed pages including the cover page and either check the box for each schedule you use to disclose interests; **or** if you have nothing to disclose on any schedule, check the “No reportable interests” box. Please **do not** attach any blank schedules.

### Part 5. Verification

Complete the verification by signing the statement and entering the date signed. Each statement must have an original “wet” signature unless filed with a secure electronic signature. (See page 3 above.) All statements must be signed under penalty of perjury and be verified by the filer pursuant to Government Code Section 81004. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

**When you sign your statement, you are stating, under penalty of perjury, that it is true and correct.** Only the filer has authority to sign the statement. An unsigned statement is not considered filed and you may be subject to late filing penalties.

# SCHEDULE A-1

## Investments

### Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

Name

▶ NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

---

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other \_\_\_\_\_ (Describe)

Partnership Income Received of \$0 - \$499  
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/21      \_\_\_\_/\_\_\_\_\_/21  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

---

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other \_\_\_\_\_ (Describe)

Partnership Income Received of \$0 - \$499  
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/21      \_\_\_\_/\_\_\_\_\_/21  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

---

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other \_\_\_\_\_ (Describe)

Partnership Income Received of \$0 - \$499  
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/21      \_\_\_\_/\_\_\_\_\_/21  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

---

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other \_\_\_\_\_ (Describe)

Partnership Income Received of \$0 - \$499  
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/21      \_\_\_\_/\_\_\_\_\_/21  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

---

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other \_\_\_\_\_ (Describe)

Partnership Income Received of \$0 - \$499  
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/21      \_\_\_\_/\_\_\_\_\_/21  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

---

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other \_\_\_\_\_ (Describe)

Partnership Income Received of \$0 - \$499  
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/21      \_\_\_\_/\_\_\_\_\_/21  
ACQUIRED                  DISPOSED

Comments: \_\_\_\_\_

## Instructions – Schedules A-1 and A-2 Investments

“Investment” means a financial interest in any business entity (including a consulting business or other independent contracting business) that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency’s jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more at any time during the reporting period. (See Reference Pamphlet, page 13.)

### Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 13.)
- Sole proprietorships
- Your own business or your spouse’s or registered domestic partner’s business (See Reference Pamphlet, page 8, for the definition of “business entity.”)
- Your spouse’s or registered domestic partner’s investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 15.)
- If you, your spouse or registered domestic partner, and dependent children together had a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. (See Reference Pamphlet, page 16, for more information on disclosing trusts.)
- Business trusts

### You are not required to disclose:

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. (See Reference Pamphlet, page 13.) (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)

### Reminders

- Do you know your agency’s jurisdiction?
- Did you hold investments at any time during the period covered by this statement?
- Code filers – your disclosure categories may only require disclosure of specific investments.

- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 15.)
- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 16.)

**Use Schedule A-1** to report ownership of less than 10% (e.g., stock). Schedule C (Income) may also be required if the investment is not a stock or corporate bond. (See second example below.)

**Use Schedule A-2** to report ownership of 10% or greater (e.g., a sole proprietorship).

### To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 20 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

### Examples:

Frank Byrd holds a state agency position. His conflict of interest code requires full disclosure of investments. Frank must disclose his stock holdings of \$2,000 or more in any company that is located in or does business in California, as well as those stocks held by his spouse or registered domestic partner and dependent children.

Alice Lance is a city council member. She has a 4% interest, worth \$5,000, in a limited partnership located in the city. Alice must disclose the partnership on Schedule A-1 and income of \$500 or more received from the partnership on Schedule C.

# SCHEDULE A-2

## Investments, Income, and Assets of Business Entities/Trusts

(Ownership Interest is 10% or Greater)

**CALIFORNIA FORM 700**

FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

**▶ 1. BUSINESS ENTITY OR TRUST**

Name \_\_\_\_\_

Address (Business Address Acceptable) \_\_\_\_\_

Check one  
 Trust, go to 2       Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE      IF APPLICABLE, LIST DATE:

\$0 - \$1,999			
\$2,000 - \$10,000	____/____/21	____/____/21	
\$10,001 - \$100,000	ACQUIRED	DISPOSED	
\$100,001 - \$1,000,000			
Over \$1,000,000			

NATURE OF INVESTMENT  
 Partnership     Sole Proprietorship    \_\_\_\_\_ Other

YOUR BUSINESS POSITION \_\_\_\_\_

**▶ 1. BUSINESS ENTITY OR TRUST**

Name \_\_\_\_\_

Address (Business Address Acceptable) \_\_\_\_\_

Check one  
 Trust, go to 2       Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE      IF APPLICABLE, LIST DATE:

\$0 - \$1,999			
\$2,000 - \$10,000	____/____/21	____/____/21	
\$10,001 - \$100,000	ACQUIRED	DISPOSED	
\$100,001 - \$1,000,000			
Over \$1,000,000			

NATURE OF INVESTMENT  
 Partnership     Sole Proprietorship    \_\_\_\_\_ Other

YOUR BUSINESS POSITION \_\_\_\_\_

**▶ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)**

\$0 - \$499	\$10,001 - \$100,000
\$500 - \$1,000	OVER \$100,000
\$1,001 - \$10,000	

**▶ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)**

\$0 - \$499	\$10,001 - \$100,000
\$500 - \$1,000	OVER \$100,000
\$1,001 - \$10,000	

**▶ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)**

None    or    Names listed below \_\_\_\_\_

**▶ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)**

None    or    Names listed below \_\_\_\_\_

**▶ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST**

Check one box:

INVESTMENT       REAL PROPERTY

---

Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property \_\_\_\_\_

---

Description of Business Activity or City or Other Precise Location of Real Property \_\_\_\_\_

FAIR MARKET VALUE      IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000			
\$10,001 - \$100,000	____/____/21	____/____/21	
\$100,001 - \$1,000,000	ACQUIRED	DISPOSED	
Over \$1,000,000			

NATURE OF INTEREST  
 Property Ownership/Deed of Trust       Stock       Partnership

Leasehold \_\_\_\_\_ Other \_\_\_\_\_  
Yrs. remaining

Check box if additional schedules reporting investments or real property are attached

**▶ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST**

Check one box:

INVESTMENT       REAL PROPERTY

---

Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property \_\_\_\_\_

---

Description of Business Activity or City or Other Precise Location of Real Property \_\_\_\_\_

FAIR MARKET VALUE      IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000			
\$10,001 - \$100,000	____/____/21	____/____/21	
\$100,001 - \$1,000,000	ACQUIRED	DISPOSED	
Over \$1,000,000			

NATURE OF INTEREST  
 Property Ownership/Deed of Trust       Stock       Partnership

Leasehold \_\_\_\_\_ Other \_\_\_\_\_  
Yrs. remaining

Check box if additional schedules reporting investments or real property are attached

**Comments:** \_\_\_\_\_

## Instructions – Schedule A-2

### Investments, Income, and Assets of Business Entities/Trusts

Use Schedule A-2 to report investments in a business entity (including a consulting business or other independent contracting business) or trust (including a living trust) in which you, your spouse or registered domestic partner, and your dependent children, together or separately, had a 10% or greater interest, totaling \$2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction. Do not report a trust that contains non-reportable interests. For example, a trust containing only your personal residence not used in whole or in part as a business, your savings account, and some municipal bonds, is not reportable.

Also report on Schedule A-2 investments and real property held by that entity or trust if your pro rata share of the investment or real property interest was \$2,000 or more during the reporting period.

#### To Complete Schedule A-2:

**Part 1.** Disclose the name and address of the business entity or trust. If you are reporting an interest in a business entity, check "Business Entity" and complete the box as follows:

- Provide a general description of the business activity of the entity.
- Check the box indicating the highest fair market value of your investment during the reporting period.
- If you initially acquired or entirely disposed of this interest during the reporting period, enter the date acquired or disposed.
- Identify the nature of your investment.
- Disclose the job title or business position you held with the entity, if any (i.e., if you were a director, officer, partner, trustee, employee, or held any position of management). A business position held by your spouse is not reportable.

**Part 2.** Check the box indicating **your pro rata** share of the **gross** income received **by** the business entity or trust. This amount includes your pro rata share of the **gross** income **from** the business entity or trust, as well as your community property interest in your spouse's or registered domestic partner's share. Gross income is the total amount of income before deducting expenses, losses, or taxes.

**Part 3.** Disclose the name of each source of income that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency's jurisdiction, as follows:

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was \$10,000 or more during the reporting period. (See Reference Pamphlet, page 11, for examples.) Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.
- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in Part 1. (See Reference Pamphlet, page 8.)

You may be required to disclose sources of income located outside your jurisdiction. For example, you may have a client who resides outside your jurisdiction who does business on a regular basis with you. Such a client, if a reportable source of \$10,000 or more, must be disclosed.

Mark "None" if you do not have any reportable \$10,000 sources of income to disclose. Phrases such as "various clients" or "not disclosing sources pursuant to attorney-client privilege" are not adequate disclosure. (See Reference Pamphlet, page 14, for information on procedures to request an exemption from disclosing privileged information.)

**Part 4.** Report any investments or interests in real property held or leased **by the entity or trust** identified in Part 1 if your pro rata share of the interest held was \$2,000 or more during the reporting period. Attach additional schedules or use FPPC's Form 700 Excel spreadsheet if needed.

- Check the applicable box identifying the interest held as real property or an investment.
- If investment, provide the name and description of the business entity.
- If real property, report the precise location (e.g., an assessor's parcel number or address).
- Check the box indicating the highest fair market value of your interest in the real property or investment during the reporting period. (Report the fair market value of the portion of your residence claimed as a tax deduction if you are utilizing your residence for business purposes.)
- Identify the nature of your interest.
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property or investment during the reporting period.

**SCHEDULE B**  
**Interests in Real Property**  
 (Including Rental Income)

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

---

FAIR MARKET VALUE      IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000		
\$10,001 - \$100,000	____/____/21	____/____/21
\$100,001 - \$1,000,000	ACQUIRED	DISPOSED
Over \$1,000,000		

NATURE OF INTEREST

Ownership/Deed of Trust	Easement
Leasehold _____	_____
Yrs. remaining	Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

\$0 - \$499	\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000	

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

None

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

---

FAIR MARKET VALUE      IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000		
\$10,001 - \$100,000	____/____/21	____/____/21
\$100,001 - \$1,000,000	ACQUIRED	DISPOSED
Over \$1,000,000		

NATURE OF INTEREST

Ownership/Deed of Trust	Easement
Leasehold _____	_____
Yrs. remaining	Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

\$0 - \$499	\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000	

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

None

\* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

INTEREST RATE      TERM (Months/Years)

_____ %	None	_____
---------	------	-------

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000

Guarantor, if applicable \_\_\_\_\_

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

INTEREST RATE      TERM (Months/Years)

_____ %	None	_____
---------	------	-------

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000

Guarantor, if applicable \_\_\_\_\_

Comments: \_\_\_\_\_



## Instructions – Schedule B Interests in Real Property

Report interests in real property located in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more any time during the reporting period. Real property is also considered to be "within the jurisdiction" of a local government agency if the property or any part of it is located within two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency. (See Reference Pamphlet, page 13.)

### Interests in real property include:

- An ownership interest (including a beneficial ownership interest)
- A deed of trust, easement, or option to acquire property
- A leasehold interest (See Reference Pamphlet, page 14.)
- A mining lease
- An interest in real property held in a retirement account (See Reference Pamphlet, page 15.)
- An interest in real property held by a business entity or trust in which you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater ownership interest (Report on Schedule A-2.)
- Your spouse's or registered domestic partner's interests in real property that are legally held separately by him or her

### You are not required to report:

- A residence, such as a home or vacation cabin, used exclusively as a personal residence (However, a residence in which you rent out a room or for which you claim a business deduction may be reportable. If reportable, report the fair market value of the portion claimed as a tax deduction.)
- Some interests in real property held through a blind trust (See Reference Pamphlet, page 16.)
  - **Please note:** A non-reportable property can still be grounds for a conflict of interest and may be disqualifying.

### To Complete Schedule B:

- Report the precise location (e.g., an assessor's parcel number or address) of the real property.
- Check the box indicating the fair market value of your interest in the property (regardless of what you owe on the property).
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property during the reporting period.
- Identify the nature of your interest. If it is a leasehold,

#### Reminders

- Income and loans already reported on Schedule B are not also required to be reported on Schedule C.
- Real property already reported on Schedule A-2, Part 4 is not also required to be reported on Schedule B.
- Code filers – do your disclosure categories require disclosure of real property?

disclose the number of years remaining on the lease.

- If you received rental income, check the box indicating the gross amount you received.
- If you had a 10% or greater interest in real property and received rental income, list the name of the source(s) if your pro rata share of the gross income from any single tenant was \$10,000 or more during the reporting period. If you received a total of \$10,000 or more from two or more tenants acting in concert (in most cases, this will apply to married couples), disclose the name of each tenant. Otherwise, mark "None."
- Loans from a private lender that total \$500 or more and are secured by real property may be reportable. **Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.**

When reporting a loan:

- Provide the name and address of the lender.
- Describe the lender's business activity.
- Disclose the interest rate and term of the loan. For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period. The term of a loan is the total number of months or years given for repayment of the loan at the time the loan was established.
- Check the box indicating the highest balance of the loan during the reporting period.
- Identify a guarantor, if applicable.

If you have more than one reportable loan on a single piece of real property, report the additional loan(s) on Schedule C.

### Example:

Allison Gande is a city planning commissioner. During the reporting period, she received rental income of \$12,000, from a single tenant who rented property she owned in the city's jurisdiction. If Allison received \$6,000 each from two tenants, the tenants' names would not be required because no single tenant paid her \$10,000 or more. A married couple is considered a single tenant.

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS <b>4600 24th Street</b>	
CITY <b>Sacramento</b>	
FAIR MARKET VALUE <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: ____/____/XX    ____/____/XX ACQUIRED    DISPOSED
NATURE OF INTEREST <input type="checkbox"/> Ownership/Deed of Trust <input type="checkbox"/> Easement <input type="checkbox"/> Leasehold    Yrs. remaining: _____ <input type="checkbox"/> Other	
IF RENTAL PROPERTY, GROSS INCOME RECEIVED <input type="checkbox"/> \$0 - \$499 <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	
SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more. <input type="checkbox"/> None <b>Henry Wells</b>	
NAME OF LENDER* <b>Sophia Petroillo</b>	
ADDRESS (Business Address Acceptable) <b>2121 Blue Sky Parkway, Sacramento</b>	
BUSINESS ACTIVITY, IF ANY, OF LENDER <b>Restaurant Owner</b>	
INTEREST RATE <b>8</b> % <input type="checkbox"/> None	TERM (Months/Years) <b>15</b> Years
HIGHEST BALANCE DURING REPORTING PERIOD <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	
<input type="checkbox"/> Guarantor, if applicable	
Comments: _____	

# SCHEDULE C

## Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

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**CALIFORNIA FORM 700**  
 FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

▶ 1. INCOME RECEIVED		▶ 1. INCOME RECEIVED	
NAME OF SOURCE OF INCOME _____		NAME OF SOURCE OF INCOME _____	
ADDRESS <i>(Business Address Acceptable)</i> _____		ADDRESS <i>(Business Address Acceptable)</i> _____	
BUSINESS ACTIVITY, IF ANY, OF SOURCE _____		BUSINESS ACTIVITY, IF ANY, OF SOURCE _____	
YOUR BUSINESS POSITION _____		YOUR BUSINESS POSITION _____	
GROSS INCOME RECEIVED	No Income - Business Position Only	GROSS INCOME RECEIVED	No Income - Business Position Only
\$500 - \$1,000	\$1,001 - \$10,000	\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000	\$10,001 - \$100,000	OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED		CONSIDERATION FOR WHICH INCOME WAS RECEIVED	
Salary	Spouse's or registered domestic partner's income <i>(For self-employed use Schedule A-2.)</i>	Salary	Spouse's or registered domestic partner's income <i>(For self-employed use Schedule A-2.)</i>
Partnership <i>(Less than 10% ownership. For 10% or greater use Schedule A-2.)</i>		Partnership <i>(Less than 10% ownership. For 10% or greater use Schedule A-2.)</i>	
Sale of _____ <i>(Real property, car, boat, etc.)</i>		Sale of _____ <i>(Real property, car, boat, etc.)</i>	
Loan repayment		Loan repayment	
Commission or Rental Income, <i>list each source of \$10,000 or more</i>		Commission or Rental Income, <i>list each source of \$10,000 or more</i>	
_____ <i>(Describe)</i>		_____ <i>(Describe)</i>	
Other _____ <i>(Describe)</i>		Other _____ <i>(Describe)</i>	

**▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD**

\* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER* _____	INTEREST RATE _____ %	TERM (Months/Years) _____
ADDRESS <i>(Business Address Acceptable)</i> _____	None _____	
BUSINESS ACTIVITY, IF ANY, OF LENDER _____	SECURITY FOR LOAN	
HIGHEST BALANCE DURING REPORTING PERIOD	None _____ Personal residence _____	
\$500 - \$1,000	Real Property _____ <i>Street address</i>	
\$1,001 - \$10,000	_____ <i>City</i>	
\$10,001 - \$100,000	Guarantor _____	
OVER \$100,000	Other _____ <i>(Describe)</i>	

**Comments:** \_\_\_\_\_

## Instructions – Schedule C

### Income, Loans, & Business Positions

#### (Income Other Than Gifts and Travel Payments)

#### Reporting Income:

Report the source and amount of gross income of \$500 or more you received during the reporting period. Gross income is the total amount of income before deducting expenses, losses, or taxes and includes loans other than loans from a commercial lending institution. (See Reference Pamphlet, page 11.) You must also report the source of income to your spouse or registered domestic partner if your community property share was \$500 or more during the reporting period.

The source and income must be reported only if the source is located in, doing business in, planning to do business in, or has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) Reportable sources of income may be further limited by your disclosure category located in your agency's conflict of interest code.

#### Reporting Business Positions:

You must report your job title with each reportable business entity even if you received no income during the reporting period. Use the comments section to indicate that no income was received.

#### Commonly reportable income and loans include:

- Salary/wages, per diem, and reimbursement for expenses including travel payments provided by your employer
- Community property interest (50%) in your spouse's or registered domestic partner's income - **report the employer's name and all other required information**
- Income from investment interests, such as partnerships, reported on Schedule A-1
- Commission income not required to be reported on Schedule A-2 (See Reference Pamphlet, page 8.)
- Gross income from any sale, including the sale of a house or car (Report your pro rata share of the total sale price.)
- Rental income not required to be reported on Schedule B
- Prizes or awards not disclosed as gifts
- Payments received on loans you made to others
- An honorarium received prior to becoming a public official (See Reference Pamphlet, page 10.)
- Incentive compensation (See Reference Pamphlet, page 12.)

#### Reminders

- Code filers – your disclosure categories may not require disclosure of all sources of income.
- If you or your spouse or registered domestic partner are self-employed, report the business entity on Schedule A-2.
- Do not disclose on Schedule C income, loans, or business positions already reported on Schedules A-2 or B.

#### You are not required to report:

- Salary, reimbursement for expenses or per diem, or social security, disability, or other similar benefit payments received by you or your spouse or registered domestic partner from a federal, state, or local government agency.
- Stock dividends and income from the sale of stock unless the source can be identified.
- Income from a PERS retirement account.

(See Reference Pamphlet, page 12.)

#### To Complete Schedule C:

##### Part 1. Income Received/Business Position Disclosure

- Disclose the name and address of each source of income or each business entity with which you held a business position.
- Provide a general description of the business activity if the source is a business entity.
- Check the box indicating the amount of gross income received.
- Identify the consideration for which the income was received.
- For income from commission sales, check the box indicating the gross income received and list the name of each source of commission income of \$10,000 or more. (See Reference Pamphlet, page 8.) **Note: If you receive commission income on a regular basis or have an ownership interest of 10% or more, you must disclose the business entity and the income on Schedule A-2.**
- Disclose the job title or business position, if any, that you held with the business entity, even if you did not receive income during the reporting period.

##### Part 2. Loans Received or Outstanding During the Reporting Period

- Provide the name and address of the lender.
- Provide a general description of the business activity if the lender is a business entity.
- Check the box indicating the highest balance of the loan during the reporting period.
- Disclose the interest rate and the term of the loan.
  - For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period.
  - The term of the loan is the total number of months or years given for repayment of the loan at the time the loan was entered into.
- Identify the security, if any, for the loan.

## SCHEDULE D Income – Gifts

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

**Comments:** \_\_\_\_\_

\_\_\_\_\_

## Instructions – Schedule D Income – Gifts

A gift is anything of value for which you have not provided equal or greater consideration to the donor. A gift is reportable if its fair market value is \$50 or more. In addition, multiple gifts totaling \$50 or more received during the reporting period from a single source must be reported.

It is the acceptance of a gift, not the ultimate use to which it is put, that imposes your reporting obligation. Except as noted below, you must report a gift even if you never used it or if you gave it away to another person.

If the exact amount of a gift is unknown, you must make a good faith estimate of the item's fair market value. Listing the value of a gift as "over \$50" or "value unknown" is not adequate disclosure. In addition, if you received a gift through an intermediary, you must disclose the name, address, and business activity of both the donor and the intermediary. You may indicate an intermediary either in the "source" field after the name or in the "comments" section at the bottom of Schedule D.

### Commonly reportable gifts include:

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- Parking passes not used for official agency business
- Food, beverages, and accommodations, including those provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering
- Rebates/discounts not made in the regular course of business to members of the public without regard to official status
- Wedding gifts (See Reference Pamphlet, page 16)
- An honorarium received prior to assuming office (You may report an honorarium as income on Schedule C, rather than as a gift on Schedule D, if you provided services of equal or greater value than the payment received. See Reference Pamphlet, page 10.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

### Reminders

- Gifts from a single source are subject to a \$520 limit in 2021. (See Reference Pamphlet, page 10.)
- Code filers – you only need to report gifts from reportable sources.

### Gift Tracking Mobile Application

- FPPC has created a gift tracking app for mobile devices that helps filers track gifts and provides a quick and easy way to upload the information to the Form 700. Visit FPPC's website to download the app.

### You are not required to disclose:

- Gifts that were not used and that, within 30 days after receipt, were returned to the donor or delivered to a charitable organization or government agency without being claimed by you as a charitable contribution for tax purposes
- Gifts from your spouse or registered domestic partner, child, parent, grandparent, grandchild, brother, sister, and certain other family members (See Regulation 18942 for a complete list.). The exception does not apply if the donor was acting as an agent or intermediary for a reportable source who was the true donor.
- Gifts of similar value exchanged between you and an individual, other than a lobbyist registered to lobby your state agency, on holidays, birthdays, or similar occasions
- Gifts of informational material provided to assist you in the performance of your official duties (e.g., books, pamphlets, reports, calendars, periodicals, or educational seminars)
- A monetary bequest or inheritance (However, inherited investments or real property may be reportable on other schedules.)
- Personalized plaques or trophies with an individual value of less than \$250
- Campaign contributions
- Up to two tickets, for your own use, to attend a fundraiser for a campaign committee or candidate, or to a fundraiser for an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. The ticket must be received from the organization or committee holding the fundraiser.
- Gifts given to members of your immediate family if the source has an established relationship with the family member and there is no evidence to suggest the donor had a purpose to influence you. (See Regulation 18943.)
- Free admission, food, and nominal items (such as a pen, pencil, mouse pad, note pad or similar item) available to all attendees, at the event at which the official makes a speech (as defined in Regulation 18950(b)(2)), so long as the admission is provided by the person who organizes the event.
- Any other payment not identified above, that would otherwise meet the definition of gift, where the payment is made by an individual who is not a lobbyist registered to lobby the official's state agency, where it is clear that the gift was made because of an existing personal or business relationship unrelated to the official's position and there is no evidence whatsoever at the time the gift is made to suggest the donor had a purpose to influence you.

### To Complete Schedule D:

- Disclose the full name (not an acronym), address, and, if a business entity, the business activity of the source.
- Provide the date (month, day, and year) of receipt, and disclose the fair market value and description of the gift.

**SCHEDULE E**  
**Income – Gifts**  
**Travel Payments, Advances,**  
**and Reimbursements**

- Mark either the gift or income box.
- Mark the “501(c)(3)” box for a travel payment received from a nonprofit 501(c)(3) organization or the “Speech” box if you made a speech or participated in a panel. Per Government Code Section 89506, these payments may not be subject to the gift limit. However, they may result in a disqualifying conflict of interest.
- For gifts of travel, provide the travel destination.

▶ NAME OF SOURCE *(Not an Acronym)* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

CITY AND STATE \_\_\_\_\_

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE \_\_\_\_\_

DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

▶ MUST CHECK ONE:      Gift **-or-**      Income

    Made a Speech/Participated in a Panel \_\_\_\_\_

    Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

CITY AND STATE \_\_\_\_\_

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE \_\_\_\_\_

DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

▶ MUST CHECK ONE:      Gift **-or-**      Income

    Made a Speech/Participated in a Panel \_\_\_\_\_

    Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

CITY AND STATE \_\_\_\_\_

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE \_\_\_\_\_

DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

▶ MUST CHECK ONE:      Gift **-or-**      Income

    Made a Speech/Participated in a Panel \_\_\_\_\_

    Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

CITY AND STATE \_\_\_\_\_

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE \_\_\_\_\_

DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

▶ MUST CHECK ONE:      Gift **-or-**      Income

    Made a Speech/Participated in a Panel \_\_\_\_\_

    Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

**Comments:** \_\_\_\_\_

## Instructions – Schedule E Travel Payments, Advances, and Reimbursements

Travel payments reportable on Schedule E include advances and reimbursements for travel and related expenses, including lodging and meals.

Gifts of travel may be subject to the gift limit. In addition, certain travel payments are reportable gifts, but are not subject to the gift limit. To avoid possible misinterpretation or the perception that you have received a gift in excess of the gift limit, you may wish to provide a specific description of the purpose of your travel. (See the FPPC fact sheet entitled “Limitations and Restrictions on Gifts, Honoraria, Travel, and Loans” to read about travel payments under section 89506(a).)

### You are **not** required to disclose:

- Travel payments received from any state, local, or federal government agency for which you provided services equal or greater in value than the payments received, such as reimbursement for travel on agency business from your government agency employer.
- A payment for travel from another local, state, or federal government agency and related per diem expenses when the travel is for education, training or other inter-agency programs or purposes.
- Travel payments received from your employer in the normal course of your employment that are included in the income reported on Schedule C.
- A travel payment that was received from a nonprofit entity exempt from taxation under Internal Revenue Code Section 501(c)(3) for which you provided equal or greater consideration, such as reimbursement for travel on business for a 501(c)(3) organization for which you are a board member.

**Note: Certain travel payments may not be reportable if reported via email on Form 801 by your agency.**

### To Complete Schedule E:

- Disclose the full name (not an acronym) and address of the source of the travel payment.
- Identify the business activity if the source is a business entity.
- Check the box to identify the payment as a gift or income, report the amount, and disclose the date(s).
  - **Travel payments are gifts** if you did not provide services that were equal to or greater in value than the payments received. You must disclose gifts totaling \$500 or more from a single source during the period covered by the statement.

When reporting travel payments that are gifts, you must provide a description of the gift, the **date(s)** received, and the **travel destination**.

- **Travel payments are income** if you provided services that were equal to or greater in value than the

payments received. You must disclose income totaling \$500 or more from a single source during the period covered by the statement. You have the burden of proving the payments are income rather than gifts. When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments that are income.

### Example:

City council member MaryClaire Chandler is the chair of a 501(c)(6) trade association, and the association pays for her travel to attend its meetings. Because MaryClaire is deemed to be providing equal or greater consideration for the travel payment by virtue of serving on the board, this payment may be reported as income. Payments for MaryClaire to attend other events for which she is not providing services are likely considered gifts. Note that the same payment from a 501(c)(3) would NOT be reportable.

▶ NAME OF SOURCE (Not an Acronym)	
Health Services Trade Association	
ADDRESS (Business Address Acceptable)	
1230 K Street, Suite 610	
CITY AND STATE	
Sacramento, CA	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
Association of Healthcare Workers	
DATE(S):	AMT: \$ 550.00
(If gift)	
▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input checked="" type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for board meeting.</u>	
▶ If Gift, Provide Travel Destination _____	

### Example:

Mayor Kim travels to China on a trip organized by China Silicon Valley Business Development, a California nonprofit, 501(c)(6) organization. The Chengdu Municipal People's Government pays for Mayor Kim's airfare and travel costs, as well as his meals and lodging during the trip. The trip's agenda shows that the trip's purpose is to promote job creation and economic activity in China and in Silicon Valley, so the trip is reasonably related to a governmental purpose. Thus, Mayor Kim must report the gift of travel,

▶ NAME OF SOURCE (Not an Acronym)	
Chengdu Municipal People's Government	
ADDRESS (Business Address Acceptable)	
2 Caoshi St. CaoShiJie, Qingyang Qu, Chengdu Shi,	
CITY AND STATE	
Sichuan Sheng, China, 610000	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
DATE(S):	AMT: \$ 3,874.38
(If gift)	
▶ MUST CHECK ONE: <input checked="" type="checkbox"/> Gift -or- <input type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for trip to China.</u>	
▶ If Gift, Provide Travel Destination <u>Sichuan Sheng, China</u>	

but the gift is exempt from the gift limit. In this case, the travel payments are not subject to the gift limit because the source is a foreign government and because the travel is reasonably related to a governmental purpose. (Section 89506(a)(2).) Note that Mayor Kim could be disqualified from participating in or making decisions about The Chengdu Municipal People's Government for 12 months. Also note that if China Silicon Valley Business Development (a 501(c)(6) organization) paid for the travel costs rather than the governmental organization, the payments would be subject to the gift limits. (See the FPPC fact sheet, Limitations and Restrictions on Gifts, Honoraria, Travel and Loans, at [www.fppc.ca.gov](http://www.fppc.ca.gov).)

## Restrictions and Prohibitions

The Political Reform Act (Gov. Code Sections 81000-91014) requires most state and local government officials and employees to publicly disclose their economic interests including personal assets and income. The Act's conflict of interest provisions also disqualify a public official from taking part in a governmental decision if it is reasonably foreseeable that the decision will have a material financial effect on these economic interests as well as the official's personal finances and those of immediate family. (Gov. Code Sections 87100 and 87103.) The Fair Political Practices Commission (FPPC) is the state agency responsible for issuing the attached Statement of Economic Interests, Form 700, and for interpreting the Act's provisions.

### Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2021-2022, the gift limit increased to \$520 from a single source during a calendar year. In 2019 and 2020, the gift limit was \$500 from a single source during a calendar year.

Additionally, state officials, state candidates, and certain state employees are subject to a \$10 limit per calendar month on gifts from lobbyists and lobbying firms registered with the Secretary of State. See Reference Pamphlet, page 10.

State and local officials and employees should check with their agency to determine if other restrictions apply.

### Disqualification

Public officials are, under certain circumstances, required to disqualify themselves from making, participating in, or attempting to influence governmental decisions that will affect their economic interests. This may include interests they are not required to disclose. For example, a personal residence is often not reportable, but may be grounds for disqualification. Specific disqualification requirements apply to 87200 filers (e.g., city councilmembers, members of boards of supervisors, planning commissioners, etc.). These officials must publicly identify the economic interest that creates a conflict of interest and leave the room before a discussion or vote takes place at a public meeting. For more information, consult Government Code Section 87105, Regulation 18707, and the Guide to Recognizing Conflicts of Interest page at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### Honorarium Ban

Most state and local officials, employees, and candidates are prohibited from accepting an honorarium for any speech given, article published, or attendance at a conference, convention, meeting, or like gathering. (See Reference Pamphlet, page 10.)

### Loan Restrictions

Certain state and local officials are subject to restrictions on loans. (See Reference Pamphlet, page 14.)

### Post-Governmental Employment

There are restrictions on representing clients or employers before former agencies. The provisions apply to elected state officials, most state employees, local elected officials, county chief administrative officers, city managers, including the chief administrator of a city, and general managers or chief administrators of local special districts and JPAs. The FPPC website has fact sheets explaining the provisions.

### Late Filing

The filing officer who retains originally-signed or electronically filed statements of economic interests may impose on an individual a fine for any statement that is filed late. The fine is \$10 per day up to a maximum of \$100. Late filing penalties may be reduced or waived under certain circumstances.

Persons who fail to timely file their Form 700 may be referred to the FPPC's Enforcement Division (and, in some cases, to the Attorney General or district attorney) for investigation and possible prosecution. In addition to the late filing penalties, a fine of up to \$5,000 per violation may be imposed.

**For assistance** concerning reporting, prohibitions, and restrictions under the Act:

- Email questions to [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov).
- Call the FPPC toll-free at (866) 275-3772.

### Form 700 is a Public Document Public Access Must Be Provided

Statements of Economic Interests are public documents. The filing officer must permit any member of the public to inspect and receive a copy of any statement.

- Statements must be available as soon as possible during the agency's regular business hours, but in any event not later than the second business day after the statement is received. Access to the Form 700 is not subject to the Public Records Act procedures.
- No conditions may be placed on persons seeking access to the forms.
- No information or identification may be required from persons seeking access.
- Reproduction fees of no more than 10 cents per page may be charged.



## Questions and Answers

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### General

- Q. What is the reporting period for disclosing interests on an assuming office statement or a candidate statement?
- A. On an assuming office statement, disclose all reportable investments, interests in real property, and business positions held on the date you assumed office. In addition, you must disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you assumed office.

On a candidate statement, disclose all reportable investments, interests in real property, and business positions held on the date you file your declaration of candidacy. You must also disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you file your declaration of candidacy.

- Q. I hold two other board positions in addition to my position with the county. Must I file three statements of economic interests?
- A. Yes, three are required. However, you may instead complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Disclose all reportable economic interests in all three jurisdictions on the expanded statement. File the expanded statement for your primary position providing an original “wet” signature unless filed with a secure electronic signature. (See page 3 above.) File copies of the expanded statement with the other two agencies as required by Regulation 18723.1(c). Remember to complete separate statements for positions that you leave or assume during the year.
- Q. I am a department head who recently began acting as city manager. Should I file as the city manager?
- A. Yes. File an assuming office statement as city manager. Persons serving as “acting,” “interim,” or “alternate” must file as if they hold the position because they are or may be performing the duties of the position.

- Q. My spouse and I are currently separated and in the process of obtaining a divorce. Must I still report my spouse’s income, investments, and interests in real property?
- A. Yes. A public official must continue to report a spouse’s economic interests until such time as dissolution of marriage proceedings is final. However, if a separate property agreement has been reached prior to that time, your estranged spouse’s income may not have to be reported. Contact the FPPC for more information.
- Q. As a designated employee, I left one state agency to work for another state agency. Must I file a leaving office statement?
- A. Yes. You may also need to file an assuming office statement for the new agency.

### Investment Disclosure

- Q. I have an investment interest in shares of stock in a company that does not have an office in my jurisdiction. Must I still disclose my investment interest in this company?
- A. Probably. The definition of “doing business in the jurisdiction” is not limited to whether the business has an office or physical location in your jurisdiction. (See Reference Pamphlet, page 13.)
- Q. My spouse and I have a living trust. The trust holds rental property in my jurisdiction, our primary residence, and investments in diversified mutual funds. I have full disclosure. How is this trust disclosed?
- A. Disclose the name of the trust, the rental property and its income on Schedule A-2. Your primary residence and investments in diversified mutual funds registered with the SEC are not reportable.
- Q. I am required to report all investments. I have an IRA that contains stocks through an account managed by a brokerage firm. Must I disclose these stocks even though they are held in an IRA and I did not decide which stocks to purchase?
- A. Yes. Disclose on Schedule A-1 or A-2 any stock worth \$2,000 or more in a business entity located in or doing business in your jurisdiction.

## Questions and Answers Continued

- Q. The value of my stock changed during the reporting period. How do I report the value of the stock?
- A. You are required to report the highest value that the stock reached during the reporting period. You may use your monthly statements to determine the highest value. You may also use the entity's website to determine the highest value. You are encouraged to keep a record of where you found the reported value. Note that for an assuming office statement, you must report the value of the stock on the date you assumed office.
- Q. I am the sole owner of my business, an S-Corporation. I believe that the nature of the business is such that it cannot be said to have any "fair market value" because it has no assets. I operate the corporation under an agreement with a large insurance company. My contract does not have resale value because of its nature as a personal services contract. Must I report the fair market value for my business on Schedule A-2 of the Form 700?
- A. Yes. Even if there are no *tangible* assets, intangible assets, such as relationships with companies and clients are commonly sold to qualified professionals. The "fair market value" is often quantified for other purposes, such as marital dissolutions or estate planning. In addition, the IRS presumes that "personal services corporations" have a fair market value. A professional "book of business" and the associated goodwill that generates income are not without a determinable value. The Form 700 does not require a precise fair market value; it is only necessary to check a box indicating the broad range within which the value falls.
- Q. I own stock in IBM and must report this investment on Schedule A-1. I initially purchased this stock in the early 1990s; however, I am constantly buying and selling shares. Must I note these dates in the "Acquired" and "Disposed" fields?
- A. No. You must only report dates in the "Acquired" or "Disposed" fields when, during the reporting period, you initially purchase a reportable investment worth \$2,000 or more or when you dispose of the entire investment. You are not required to track the partial trading of an investment.
- Q. On last year's filing I reported stock in Encoe valued at \$2,000 - \$10,000. Late last year the value of this stock fell below and remains at less than \$2,000. How should this be reported on this year's statement?
- A. You are not required to report an investment if the value was less than \$2,000 during the **entire** reporting period. However, because a disposed date is not required for stocks that fall below \$2,000, you may want to report the stock and note in the "comments" section that the value fell below \$2,000. This would be for informational purposes only; it is not a requirement.
- Q. We have a Section 529 account set up to save money for our son's college education. Is this reportable?
- A. If the Section 529 account contains reportable interests (e.g., common stock valued at \$2,000 or more), those interests are reportable (not the actual Section 529 account). If the account contains solely mutual funds, then nothing is reported.

### Income Disclosure

- Q. I reported a business entity on Schedule A-2. Clients of my business are located in several states. Must I report all clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2, Part 3?
- A. No, only the clients located in or doing business on a regular basis in your jurisdiction must be disclosed.
- Q. I believe I am not required to disclose the names of clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2 because of their right to privacy. Is there an exception for reporting clients' names?
- A. Regulation 18740 provides a procedure for requesting an exemption to allow a client's name not to be disclosed if disclosure of the name would violate a legally recognized privilege under California or Federal law. This regulation may be obtained from our website at [www.fppc.ca.gov](http://www.fppc.ca.gov). (See Reference Pamphlet, page 14.)

## Questions and Answers Continued

Q. I am sole owner of a private law practice that is not reportable based on my limited disclosure category. However, some of the sources of income to my law practice are from reportable sources. Do I have to disclose this income?

A. Yes, even though the law practice is not reportable, reportable sources of income to the law practice of \$10,000 or more must be disclosed. This information would be disclosed on Schedule C with a note in the “comments” section indicating that the business entity is not a reportable investment. The note would be for informational purposes only; it is not a requirement.

Q. I am the sole owner of my business. Where do I disclose my income - on Schedule A-2 or Schedule C?

A. Sources of income to a business in which you have an ownership interest of 10% or greater are disclosed on Schedule A-2. (See Reference Pamphlet, page 8.)

Q. My husband is a partner in a four-person firm where all of his business is based on his own billings and collections from various clients. How do I report my community property interest in this business and the income generated in this manner?

A. If your husband’s investment in the firm is 10% or greater, disclose 100% of his share of the business on Schedule A-2, Part 1 and 50% of his income on Schedule A-2, Parts 2 and 3. For example, a client of your husband’s must be a source of at least \$20,000 during the reporting period before the client’s name is reported.

Q. How do I disclose my spouse’s or registered domestic partner’s salary?

A. Report the name of the employer as a source of income on Schedule C.

Q. I am a doctor. For purposes of reporting \$10,000 sources of income on Schedule A-2, Part 3, are the patients or their insurance carriers considered sources of income?

A. If your patients exercise sufficient control by selecting you instead of other doctors, then your patients, rather than their insurance carriers, are sources of income to you. (See Reference Pamphlet, page 14.)

Q. I received a loan from my grandfather to purchase my home. Is this loan reportable?

A. No. Loans received from family members are not reportable.

Q. Many years ago, I loaned my parents several thousand dollars, which they paid back this year. Do I need to report this loan repayment on my Form 700?

A. No. Payments received on a loan made to a family member are not reportable.

### Real Property Disclosure

Q. During this reporting period we switched our principal place of residence into a rental. I have full disclosure and the property is located in my agency’s jurisdiction, so it is now reportable. Because I have not reported this property before, do I need to show an “acquired” date?

A. No, you are not required to show an “acquired” date because you previously owned the property. However, you may want to note in the “comments” section that the property was not previously reported because it was used exclusively as your residence. This would be for informational purposes only; it is not a requirement.

Q. I am a city manager, and I own a rental property located in an adjacent city, but one mile from the city limit. Do I need to report this property interest?

A. Yes. You are required to report this property because it is located within 2 miles of the boundaries of the city you manage.

Q. Must I report a home that I own as a personal residence for my daughter?

A. You are not required to disclose a home used as a personal residence for a family member unless you receive income from it, such as rental income.

Q. I am a co-signer on a loan for a rental property owned by a friend. Since I am listed on the deed of trust, do I need to report my friend’s property as an interest in real property on my Form 700?

A. No. Simply being a co-signer on a loan for property does not create a reportable interest in that real property.

## Questions and Answers Continued

### Gift Disclosure

- Q. If I received a reportable gift of two tickets to a concert valued at \$100 each, but gave the tickets to a friend because I could not attend the concert, do I have any reporting obligations?
- A. Yes. Since you accepted the gift and exercised discretion and control of the use of the tickets, you must disclose the gift on Schedule D.
- Q. Julia and Jared Benson, a married couple, want to give a piece of artwork to a county supervisor. Is each spouse considered a separate source for purposes of the gift limit and disclosure?
- A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2021 the gift limit was \$520, so the Bensons may have given the supervisor artwork valued at no more than \$1,040. The supervisor must identify Jared and Julia Benson as the sources of the gift.
- Q. I am a Form 700 filer with full disclosure. Our agency holds a holiday raffle to raise funds for a local charity. I bought \$10 worth of raffle tickets and won a gift basket valued at \$120. The gift basket was donated by Doug Brewer, a citizen in our city. At the same event, I bought raffle tickets for, and won a quilt valued at \$70. The quilt was donated by a coworker. Are these reportable gifts?
- A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at \$110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was donated by an employee of your agency, it is not a reportable gift.
- Q. My agency is responsible for disbursing grants. An applicant (501(c)(3) organization) met with agency employees to present its application. At this meeting, the applicant provided food and beverages. Would the food and beverages be considered gifts to the employees? These employees are designated in our agency's conflict of interest code and the applicant is a reportable source of income under the code.
- A. Yes. If the value of the food and beverages consumed by any one filer, plus any other gifts received from the same source during the reporting period total \$50 or more, the food and beverages would be reported using the fair market value and would be subject to the gift limit.
- Q. I received free admission to an educational conference related to my official duties. Part of the conference fees included a round of golf. Is the value of the golf considered informational material?
- A. No. The value of personal benefits, such as golf, attendance at a concert, or sporting event, are gifts subject to reporting and limits.



## Safe Return to In-Person Instruction and Continuity of Services Plan ("Reopening Plan")

As Marcum-Illinois School returns to being fully open, protocols and information have been updated. These protocols, address CDC and California Department of Public Health (CDPH) recommendations and will be revisited every 6 months to address any changes.

### Maintaining Health and Safety

#### Masks

All staff and students will correctly wear masks in accordance with CDPH guidelines unless exempt per the guidelines.

- Masks are optional outdoors.
- Masks are required to be worn indoors, unless exempt per [CDPH face mask guidance](#).
  - The site has a supply of disposable masks for anyone who is unable to provide their own.
- A non-restrictive alternative, such as a face shield with a drape on the bottom edge may be worn under specific circumstances.
- Students will be taught and reminded how to properly wear face coverings, not to touch the face covering, and to wash hands frequently.
- The district has posted signs to communicate the face coverings requirements on the premises.

Schools must develop and implement local protocols to enforce the mask requirements. Marcum-Illinois School's protocols to enforce mask requirements include:

- Remind of the mask requirement and provide a mask if needed.
- Call parents to discuss mask requirement.
- Administration will meet with parents to discuss and create a long term plan (ex: independent study).

#### Physical Distancing

Recent evidence indicates that in-person instruction can occur safely without minimum physical distancing requirements when other mitigation strategies (e.g., masking) are implemented.

#### Healthy Hygiene Practices

Staff and parents will teach and reinforce [washing hands](#), avoiding [contact with one's eyes](#), nose, and mouth, and [covering coughs and sneezes](#) following CDPH and CDC recommendations. Teachers will develop routines enabling students and staff to regularly wash their hands. All classrooms, offices, and meeting rooms are equipped with adequate hand washing facilities and hand sanitizer.



### **Cleaning and Disinfection**

Marcum-Illinois School has established routine schedules and ensures there are adequate supplies to clean and disinfect common surfaces and objects in the workplace. The process of disinfecting includes providing disinfecting products that are EPA approved for use against the virus that causes COVID-19 and following the manufacturer's instructions for all cleaning and disinfection products (e.g., safety requirements, PPE, concentration, contact time). Each classroom, office, bathroom, and staff area shall be cleaned daily. Should there be a COVID-19 case in the workplace, the district will clean and disinfect all areas used by the sick person, such as offices, bathrooms, common areas, shared equipment.

### **Ventilation**

For indoor locations, the district has evaluated how to maximize the quantity of outdoor air and whether it is possible to increase filtration efficiency to the highest level compatible with the existing ventilation system. Marcum-Illinois School services the ventilation systems regularly replacing all filters and servicing any needed repairs.

### **Food Service**

The district will return to regular food service and will:

- Maximize physical distance as much as possible while eating (especially indoors) and arrange for eating outdoors as much as feasible.
- Clean frequently touched surfaces often. Surfaces that come in contact with food will be washed, rinsed, and sanitized before and after meals.

### **Campus Management & Access**

During the school day and when any district programs are in session (including Morning Den and Afterschool Den), campus access will be limited to staff, students, and those on official school business. Volunteers may be permitted on campus and/or on field trips if they are symptom free and test negative for COVID-19 the day of volunteering with a district provided rapid test on campus. Volunteers may have other requirements including, but not limited to, fingerprinting and background clearance as required by the district.

### **Transportation**

While riding the bus, students and staff must wear a mask. Social distancing will be utilized on the bus to the most appropriate extent possible.

### **Staying Home When Sick**

Everyone entering the school are asked to perform daily wellness checks. Anyone who expresses symptoms related to Covid-19 are expected to stay home and follow CDC, CDPH and Sutter County Public Health Guidelines. Students will not be penalized for poor attendance due to health-related absences. Parents are asked to refrain from giving their child fever reducing medicine and then sending them to school. If they have symptoms, they should stay home, for their health and the health of others.

- Symptoms at School: The district has identified an isolation area to separate anyone who exhibits 1 or more symptoms of COVID-19 while at school.
- Return to School After Exclusion for Symptoms : Staff members and students with symptoms of COVID-19 infection are advised not to return for in-person instruction until they have met the most current CDPH

and Sutter County Public Health criteria to discontinue home isolation.

## Identification and Tracing of COVID-19 Cases

Staff members and parents of students shall contact Mrs. Irby to report a confirmed positive and/or suspected case of Covid-19. Reporting of confirmed positive and suspected cases in students and staff will follow CDPH [guidance](#). The school will contact the Sutter County Public Health Department if we are notified that a student or staff member has a positive COVID-19 test. Sutter County Public Health will work with the school on a case by case basis to determine the extent of exposure to other students and staff members and consider if classroom, office, or school closure is warranted, and the length of time based on the need to mitigate the spread of COVID-19 and allow for additional cleaning. The school will communicate with staff/families in the case of a student or staff member with a positive test for COVID-19, in accordance with the privacy requirements of FERPA/HIPPA and the communication guidance as required from County Public Health.

### *Tracing*

Marcum-Illinois has a designated COVID-19 liaison, Superintendent/Principal, Maggie Irby, to act as the communication point for all COVID-19 concerns. This individual's responsibility include:

- Managing and supporting contact tracing
- Notifying exposed persons
- Creating and maintaining a database of exposed students and staff
- Communicating with, and submitting lists of exposed students and staff to the local health department

## Testing of Students and Staff

Individuals who have symptoms of COVID-19 or have been exposed to someone with COVID-19 will stay home and isolate. They will be directed to contact their health care provider or local health department for medical guidance or to undergo testing. If testing supplies are available, MIUSD may provide testing to students with parent consent.

Staff members who are not fully vaccinated will participate in weekly COVID-19 testing provided by the district to ensure negative Covid status.

## Quarantine and Isolation

The district will follow California Department of Public Health (CDPH) guidance regarding quarantine due to exposure and isolation for people with COVID-19, including:

When both parties were wearing a mask in any school setting in which students are supervised by school staff (including indoor or outdoor school settings and school buses, including on buses operated by public and private school systems), unvaccinated students who are close contacts (more than 15 minutes over a 24-hour period within 0-6 feet indoors) may undergo a modified quarantine as follows. They may continue to attend school for in-person instruction if they:

- i. Are asymptomatic;
- ii. Continue to appropriately mask, as required;
- iii. Undergo at least twice weekly testing during the quarantine period; and
- iv. Continue to quarantine for all extracurricular activities at school, including sports, and activities within the community setting.



### **Efforts to Provide Vaccinations to the School Community and Vaccination Verification**

Marcum-Illinois will direct those interested in getting a vaccination to the Sutter County Health Department and will adhere to the CDC vaccine verification recommendations.

### **Appropriate Accommodations for Children with Disabilities (Health and Safety)**

The recommended procedures will be applied to all classroom settings, including special education services locations when possible and appropriate. Individual student needs will be addressed on a case-by-case basis.

### **Coordination with State and Local Health Officials**

The district will continue to follow recommendations from the California Department of Public Health (CDPH) and the Sutter County Health Department.

### **Communication Plan**

Marcum-Illinois will maintain communication systems that allow staff and families to self-report COVID-19 symptoms and receive immediate notifications of exposures and closures. Communication will maintain confidentiality as required by FERPA and state law related to privacy of educational records and other privacy laws. The March 2020 Student Privacy Policy FERPA & Coronavirus Disease 2019 (COVID-19) FAQs (Department of Education) will provide the staff with additional guidance on how to provide effective communication. Local Health Departments will notify the school administration if a case and contact investigation reveal exposure at the school site.

The administration and teachers will communicate clearly, consistently, and often with stakeholder groups (students, parents/guardians, staff and community) with the most up to date information available through a variety of platforms (i.e. email, website posts, newsletter, text messages, phone calls). This Reopening Plan will be posted on the district's website and reviewed every six months for possible revisions.

### **Continuity of Services**

*The LEA will ensure continuity of services, including but not limited to services to address students' academic needs and students' and staff social, emotional, mental health and other needs, which may include student health and food services. Describe how the LEA will ensure continuity of services in case isolation, quarantine, or future school closures are required, including how the LEA will meet the needs of students with disabilities and English learners.*

Our goal is to provide in-person learning to all students, addressing their academic, social, emotional, and mental health via the many programs in place within our school. The 2021-22 school year will begin with a regular school year schedule that follows our normal curriculum and assessments with an added emphasis on providing academic and social-emotional intervention to struggling students. We have invested in professional development, student support systems, and technology to support the transition to independent study should that become necessary.

The Local Health Officer may determine that school closure is warranted. If school closure is deemed necessary, staff and students will revert to Independent Study for a temporary period. During this period, MIUSD will continue use of the same standards aligned, currently adopted curriculum as used during classroom-based instruction. This alignment supports expedient transition between independent study and classroom-based instruction. The district has invested in the technology and staff training to support independent study should it become necessary.





### Stakeholder Engagement

*The LEA sought public comments in the development of its plan and took those comments into account in the development of its plan. Describe the LEA's policy or practice that provided the public with an opportunity to provide comments and feedback and the collection process. Describe how any feedback was incorporated into the development of the plan.*

This Reopening Plan reflects current mandates and recommendations. Staff, parents, and community members were provided opportunities to provide input. The draft Reopening Plan was presented at the January 10, 2022, meeting of the Board of Trustees for discussion. The draft Reopening Plan was also presented at the February School Site Council meeting on February 1, 2022. The plan was posted on our website and stakeholders were informed of the opportunity to provide feedback. Feedback received was considered in development of the final draft. The plan was approved at the February 14, 2022 board meeting.

Date of next review: August 2022

1

**Marcum-Illinois Union Elementary  
Comprehensive School Safety Plan  
2022-2023**



Maggie Irby, Superintendent-Principal  
2452 El Centro Blvd  
(530) 656-2407  
maggiei@sutter.k12.ca.us

A meeting for public input was held on January 4, 2022

Plan Revised December 2021

Plan approved by Marcum-Illinois Union School District Governing  
Board ~~February 2022~~

This document is available for public inspection during regular business hours at the Marcum-Illinois Union Elementary School main office.

NOTE: Tactical information is excluded from the public inspection document. A "Public Inspection Log" will be used to record the name, address, phone number and method used for verifying the identity of all individuals requesting to inspect this plan. This document is not available for inspection on the internet.

2

**Marcum-Illinois  
Comprehensive School Safety Plan - Signature Page  
2021-2022**

The undersigned members of the Marcum- Illinois School-Site Council certify that the requirements of California Education Code 32280-32282 have been met in the development of the following Comprehensive School Safety Plan.

---

(name), Principal (or Designee) Date

---

(name), (Teacher's Association Representative) Date

---

(name), Parent Date

---

(name), (Classified Employee Association Representative) Date

---

(name), (Student - Optional) Date

---

(name), (Law Enforcement Agency) Date

---

(name), (Other) Date

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# **1. School Crime Assessment**

## **Attendance Rates:**

The average attendance rate for the 2020-2021 school year was 96.2%. The 2020-2021 school year occurred partially in a virtual format and partially in-person.

## **Behavior Incidents/Referrals:**

The following table displays the number of behavior incidents that were recorded in the student information system over the past several years. A \* indicates a school year impacted by school closure and/or virtual instruction due to the Covid-19 pandemic.

<b>Incident Reports</b>	2018-2019	2019-2020*	2020-2021*
Minor	281	113	11
Major	1	1	0

## **Suspension/Expulsion:**

The following table displays the number of suspensions and expulsions over the past several years. A \* indicates a school year impacted by school closure and/or virtual instruction due to the Covid-19 pandemic.

	2018-2019	2019-2020*	2020-2021*	2021-2022*
Suspensions	0	1	0	0
Expulsions	0	0	0	0

## **Property Damage**

There have been no instances of property damage on the school site within the last 3 years.

## **California Healthy Kids Survey, Spring 2021**

The tables below summarize the key indicators of school climate, substance use, student well-being, remote learning, and emotional health. This Survey was administered to 7<sup>th</sup> grade students in the spring of the 2020-2021 school year.

**Table A2.1**  
**Key Indicators of School Climate and Substance Use**

	Grade 7 %	Grade 9 %	Grade 11 %	NT %	Table
<b>School Engagement and Supports</b>					
School connectedness <sup>1*</sup>	87	–	–	–	A6.7
Academic motivation <sup>1</sup>	72	–	–	–	A6.7
Monthly Absences (3 or more) <sup>6</sup>	20	–	–	–	A6.2
Maintaining focus on schoolwork <sup>1</sup>	53	–	–	–	A6.13
Caring adult relationships <sup>2</sup>	78	–	–	–	A6.7
High expectations-adults in school <sup>1</sup>	90	–	–	–	A6.7
Meaningful participation <sup>1*</sup>	35	–	–	–	A6.7
Facilities upkeep <sup>1*</sup>	87	–	–	–	A6.16
Promotion of parent involvement in school <sup>1</sup>	84	–	–	–	A6.7
<b>School Safety</b>					
School perceived as very safe or safe <sup>6</sup>	93	–	–	–	A8.1
Experienced any harassment or bullying <sup>1*</sup>	7	–	–	–	A8.2
Had mean rumors or lies spread about you <sup>1*</sup>	14	–	–	–	A8.3
Been afraid of being beaten up <sup>1*</sup>	0	–	–	–	A8.3
Been in a physical fight <sup>1*</sup>	7	–	–	–	A8.4
Seen a weapon on campus <sup>1*</sup>	0	–	–	–	A8.6
<b>Substance Use</b>					
Current alcohol or drug use <sup>4</sup>	7	–	–	–	A9.5
Current marijuana use <sup>4</sup>	0	–	–	–	A9.5
Current binge drinking <sup>4</sup>	0	–	–	–	A9.5
Very drunk or "high" 7 or more times, ever	7	–	–	–	A9.7
Been drunk or "high" on drugs at school, ever	0	–	–	–	A9.9
Current cigarette smoking <sup>4</sup>	0	–	–	–	A10.3
Current vaping <sup>4</sup>	7	–	–	–	A10.3

Notes: Cells are empty if there are less than 10 respondents.  
<sup>1</sup>Average percent of respondents reporting "Agree" or "Strongly agree."  
<sup>2</sup>Average percent of respondents reporting "Pretty much true" or "Very much true."  
<sup>3</sup>Past 12 months.  
<sup>4</sup>Past 30 days.  
<sup>5</sup>In-School and Hybrid Models only.

**Table A2.2**  
**Key Indicators of Student Well-Being, Remote Learning, and Social and Emotional Health**

	Grade 7 %	Grade 9 %	Grade 11 %	NT %	Table
<b>Routines</b>					
Eating of breakfast <sup>1</sup>	73	–	–	–	A11.2
Bedtime (before 11 pm)	93	–	–	–	A4.1
Sleep deprivation (less than 8 hours)	7	–	–	–	A4.1
Physical exercise (meets standards) <sup>1</sup>	100	–	–	–	A4.4
<b>Learning from Home</b>					
Average days worked on schoolwork (≥ 5) <sup>4,5</sup>	–	–	–	–	A5.1
Synchronous instruction (4 days or more) <sup>3,4</sup>	–	–	–	–	A5.1
Interest in schoolwork done from home <sup>6</sup>	–	–	–	–	A5.3
Meaningful opportunities <sup>1,3</sup>	–	–	–	–	A5.2
<b>Adult and Peer Relationships</b>					
Adult supports <sup>1</sup>	81	–	–	–	A7.7
Peer supports <sup>1</sup>	60	–	–	–	A7.6
Virtual peer interactions (4 days or more) <sup>1</sup>	47	–	–	–	A4.3
Cyberbullying <sup>3</sup>	7	–	–	–	A8.3
<b>Social and Emotional Health</b>					
Social emotional distress <sup>1</sup>	9	–	–	–	A7.10
Experienced chronic sadness/hopelessness <sup>3</sup>	21	–	–	–	A7.1
Considered suicide <sup>3</sup>	7	–	–	–	A7.2
Self-Efficacy <sup>1</sup>	71	–	–	–	A7.3
Self-Awareness <sup>1</sup>	76	–	–	–	A7.4
Problem Solving <sup>1</sup>	43	–	–	–	A7.5
Optimism <sup>1</sup>	64	–	–	–	A7.8
Gratitude <sup>1</sup>	74	–	–	–	A7.9

Notes: Cells are empty if there are less than 10 respondents.  
 Aerobic physical fitness standards—at least 150 minutes of moderate-intensity or 75 minutes of vigorous-intensity physical activity per week.  
<sup>1</sup>Today.  
<sup>2</sup>Past 7 days.  
<sup>3</sup>Past 30 days.  
<sup>4</sup>Remote and Hybrid Models only.  
<sup>5</sup>Average percent of respondents reporting "Pretty much true" or "Very much true."  
<sup>6</sup>Past 12 months.

## Conclusions:

Upon review of this data, the council considers the current school safety status to be generally positive. There was interest in obtaining pre-pandemic records of the California Healthy Kids Survey to compare the well-being of our students before and after their recent experiences with distance learning, school closure, and the Covid-19 pandemic.

## **2. Safety Strategies & Programs**

### **A. Child Abuse Reporting Procedures**

#### **Duty to Report**

In conformance with the requirements of the Penal Code, any district employee 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 a victim of child abuse shall report the known or suspected instance of child abuse to the Sheriff and/or child protective agency immediately or as soon as practically possible by telephone and shall prepare and send a written report thereof within 36 hours of receiving the information concerning the incident. The reporting duties are individual and cannot be delegated to another individual except under circumstances set forth in Penal Code 11166.

For the purposes of this reporting procedure and the Penal Code, "reasonable suspicion" means that it is objectively reasonable for a person to entertain such a suspicion, based upon facts that could cause a reasonable person in a like situation, drawing when appropriate on his or her training and experience, to suspect child abuse.

#### **Definitions**

1. "Child Abuse" includes the following:
  - a. A physical injury inflicted by other than accidental means on a child by another person.
  - b. Sexual abuse of a child.
  - c. Willful cruelty or unjustifiable punishment of a child, or willfully inflicting unjustifiable physical pain or mental suffering, or failure to safeguard a child from these injuries when the child is under a person's care or custody.
  - d. Unlawful corporal punishment or injury resulting in a traumatic condition.
  - e. Neglect of a child or abuse in out-of-home care.
  
2. "Mandated Reporters" include virtually all school employees. The following school personnel are required to report: teachers, administrators, supervisors of child welfare and attendance, certificated pupil personnel employees, school psychologists, licensed nurses, counselors, and those instructional aides or other classified employees trained in child abuse reporting.

3. "Child Protective Agencies" are those law enforcement and child protective services responsible for investigating child abuse reports, including the local police or sheriff department, county welfare or juvenile probation. Employees reporting child abuse to a child protective agency are encouraged, but not required, to notify the site administrator or designee as soon as possible after the initial verbal report by telephone.

### **Contact Information**

1. Sutter County Department of Children and Family Services: (530) 822-7227

(24 hours per day-7 days per week).

2. Sutter County Sheriff's Department, Non-Emergency (530) 822-7307

Within 36 hours, a written report must be sent, faxed, or submitted electronically. The written report should be completed on a state form called 8572.

### **CHILD ABUSE TRAINING REQUIREMENT**

- All district employees must annually complete the Keenan Mandated Reporter Training Course by the beginning of each school year. Employees hired after the October 15th date are required to complete the training course within six weeks of employment.
- This course is fully compliant with California Assembly Bill 1432 and is available online through Keenan Safe Schools, the firm's online training and tracking system designed specifically for education agency employees.
- The Keenan Safe Schools learning management system will generate the required reports for proof of completion. Employees should retain a copy of the training certificate and provide a copy to their principal/site-administrator.
- The online training course is available at <http://www.keenan.com/abusepreventioncenter>



# SUSPECTED CHILD ABUSE REPORT

To Be Completed by **Mandated Child Abuse Reporters**  
Pursuant to Penal Code Section 11166

CASE NAME: \_\_\_\_\_

PLEASE PRINT OR TYPE

CASE NUMBER: \_\_\_\_\_

<b>A. REPORTING PARTY</b>	NAME OF MANDATED REPORTER		TITLE		MANDATED REPORTER CATEGORY					
	REPORTER'S BUSINESS/AGENCY NAME AND ADDRESS			Street	City	Zip	DID MANDATED REPORTER WITNESS THE INCIDENT? <input type="checkbox"/> YES <input type="checkbox"/> NO			
	REPORTER'S TELEPHONE (DAYTIME) ( )		SIGNATURE		TODAY'S DATE					
<b>B. REPORT NOTIFICATION</b>	<input type="checkbox"/> LAW ENFORCEMENT <input type="checkbox"/> COUNTY PROBATION		AGENCY							
	<input type="checkbox"/> COUNTY WELFARE / CPS (Child Protective Services)									
	ADDRESS			Street	City	Zip	DATE/TIME OF PHONE CALL			
OFFICIAL CONTACTED - TITLE					TELEPHONE ( )					
<b>C. VICTIM</b> <small>One report per victim</small>	NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE	SEX	ETHNICITY			
	ADDRESS			Street	City	Zip	TELEPHONE ( )			
	PRESENT LOCATION OF VICTIM			SCHOOL		CLASS	GRADE			
	PHYSICALLY DISABLED? <input type="checkbox"/> YES <input type="checkbox"/> NO	DEVELOPMENTALLY DISABLED? <input type="checkbox"/> YES <input type="checkbox"/> NO	OTHER DISABILITY (SPECIFY)		PRIMARY LANGUAGE SPOKEN IN HOME					
	IN FOSTER CARE? <input type="checkbox"/> YES <input type="checkbox"/> NO	IF VICTIM WAS IN OUT-OF-HOME CARE AT TIME OF INCIDENT, CHECK TYPE OF CARE: <input type="checkbox"/> DAY CARE <input type="checkbox"/> CHILD CARE CENTER <input type="checkbox"/> FOSTER FAMILY HOME <input type="checkbox"/> FAMILY FRIEND <input type="checkbox"/> GROUP HOME OR INSTITUTION <input type="checkbox"/> RELATIVE'S HOME			TYPE OF ABUSE (CHECK ONE OR MORE) <input type="checkbox"/> PHYSICAL <input type="checkbox"/> MENTAL <input type="checkbox"/> SEXUAL <input type="checkbox"/> NEGLECT <input type="checkbox"/> OTHER (SPECIFY)					
	RELATIONSHIP TO SUSPECT				PHOTOS TAKEN? <input type="checkbox"/> YES <input type="checkbox"/> NO	DID THE INCIDENT RESULT IN THIS VICTIM'S DEATH? <input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> UNK				
<b>D. INVOLVED PARTIES</b>	<b>VICTIM'S SIBLINGS</b>									
	NAME		BIRTHDATE	SEX	ETHNICITY	NAME		BIRTHDATE	SEX	ETHNICITY
	1. _____				3. _____					
	2. _____				4. _____					
	<b>VICTIM'S PARENTS/GUARDIANS</b>	NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE	SEX	ETHNICITY		
		ADDRESS			Street	City	Zip	HOME PHONE ( )	BUSINESS PHONE ( )	
		NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE	SEX	ETHNICITY		
		ADDRESS			Street	City	Zip	HOME PHONE ( )	BUSINESS PHONE ( )	
	<b>SUSPECT</b>	SUSPECT'S NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE	SEX	ETHNICITY		
		ADDRESS			Street	City	Zip	TELEPHONE ( )		
OTHER RELEVANT INFORMATION										
<b>E. INCIDENT INFORMATION</b>	IF NECESSARY, ATTACH EXTRA SHEET(S) OR OTHER FORM(S) AND CHECK THIS BOX <input type="checkbox"/> IF MULTIPLE VICTIMS, INDICATE NUMBER: _____									
	DATE / TIME OF INCIDENT				PLACE OF INCIDENT					
	NARRATIVE DESCRIPTION (What victim(s) said/what the mandated reporter observed/what person accompanying the victim(s) said/similar or past incidents involving the victim(s) or suspect)									

**DEFINITIONS AND INSTRUCTIONS ON REVERSE**

SS 8572 (Rev. 12/02)

**DO NOT** submit a copy of this form to the Department of Justice (DOJ). The investigating agency is required under Penal Code Section 11169 to submit to DOJ a Child Abuse Investigation Report Form SS 8583 if (1) an active investigation was conducted and (2) the incident was not determined to be unfounded.

WHITE COPY-Police or Sheriff's Department; BLUE COPY-County Welfare or Probation; GREEN COPY- District Attorney's Office; YELLOW COPY-Reporting Party

## DEFINITIONS AND GENERAL INSTRUCTIONS FOR COMPLETION OF FORM SS 8572

All Penal Code (PC) references are located in Article 2.5 of the PC. This article is known as the Child Abuse and Neglect Reporting Act, also known as CANRA. The Internet site is: <http://www.leginfo.ca.gov/calaw.html> (specify Penal Code and search for Sections 11164-11174.3). A mandated reporter must complete and submit the form SS 8572 even if some information is not known. (PC Section 11167(a).)

### I. MANDATED CHILD ABUSE REPORTERS

- Mandated child abuse reporters include all those individuals and entities as defined in PC Section 11165.7.

### II. TO WHOM REPORTS ARE TO BE MADE (DESIGNATED AGENCIES)

- Reports of suspected child abuse or neglect shall be made by mandated reporters to any police department or sheriff's department (not including a school district police or security department), county probation department (if designated by the county to receive mandated reports) or the county welfare department. (PC Section 11165.9.)

### III. REPORTING RESPONSIBILITIES

- Any mandated reporter 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 or neglect shall report such suspected instance of abuse or neglect to a designated agency immediately or as soon as practically possible by telephone and shall prepare and send a written report thereof *within 36 hours* of receiving the information concerning the incident. (PC Section 11166(a).)
- No mandated reporter who reports a suspected instance of child abuse or neglect shall be held civilly or criminally liable for any report required or authorized by the CANRA. Any other person reporting a known or suspected instance of child abuse or neglect shall not incur civil or criminal liability as a result of any report authorized by the CANRA unless it can be proven the report was false and the person knew it was false or make the report with reckless disregard of its truth or falsity. (PC Section 11172(a).)

### IV. INSTRUCTIONS

- SECTION A - REPORTING PARTY:** Enter the mandated reporter's name, title, category (from PC Section 11165.7), business (agency) name and address, telephone number, a signature and today's date. Also check yes-no whether you (the mandated reporter) witnessed the incident. The signature area is for either the mandated report or the person taking as telephoned report.

#### ETHNICITY CODES

1 Alaskan Native	6 Caribbean	11 Guamanian	16 Korean	22 Polynesian	27 White-Armenian
2 American Indian	7 Central American	12 Hawaiian	17 Laotian	23 Samoan	28 White-Central American
3 Asian Indian	8 Chinese	13 Hispanic	18 Mexican	24 South American	29 White-European
4 Black	9 Ethiopian	14 Hmong	19 Other Asian	25 Vietnamese	30 White-Middle Eastern
5 Cambodian	10 Filipino	15 Japanese	21 Other Pac Islndr	26 White	31 White-Romanian

### IV. INSTRUCTIONS (Continued)

- SECTION B - REPORT NOTIFICATION:** Complete the name and address of the designated agency notified, date of the written report, date/time of the phone call and the name, title and telephone number of the official contacted.
  - SECTION C - VICTIM** (One Report per Family, siblings must have same parents/guardians): Enter the victim's name, address, telephone number, birth date or approximate age, sex, ethnicity, present location, and where applicable enter the school, class (indicate the teacher's name or room number), and grade. List the primary language spoken in the victim's home. Check the appropriate yes-no box for: developmentally disabled?, physically disabled? and specify the victim's other disability. To determine if the victim has a disability, ask the victim's parent or care giver. Also check the appropriate yes-no box for in foster care?, indicate type of care if the victim was in out-of-home care, indicate the type of abuse. List the victim's relationship to the suspect, check the appropriate yes-no box for photos taken?, indicate whether the incident resulted in this victim's death.
  - SECTION D - INVOLVED PARTIES:** Enter the requested information for: Victim's Siblings, Victim's Parents/Guardians and the Suspect.
  - SECTION E - INCIDENT INFORMATION:** If multiple victims, enter the number. Enter date/time and place of the incident. Provide a narrative of the incident. Attach extra sheets if needed.
- ### V. DISTRIBUTION
- Reporting Party:** After completing Form SS 8572, retain the yellow copy for your records and submit the top three copies to the designated agency.
  - Designated Agency:** *Within 36 hours* of receipt of Form SS 8572, send **white copy** to police or sheriff, **blue copy** to county welfare or probation, and **green copy** to district attorney.

## **B. Disaster Response Procedures**

In order to ensure the safety of all staff, students, and parents at Marcum-Illinois School, this Disaster Plan contains instructions and procedures for dealing with various emergencies. The response procedures are intended primarily as a ready reference for all staff to be studied and practiced prior to the occurrence of an emergency. Disaster Plan tests will be recorded and kept in a file by the Superintendent or designee.

### **EMERGENCY CONTACTS / PHONE LIST**

### **COMMUNICATION PLANS / CRISIS TOOLBOX CHECKLIST**

### **EMERGENCY PROCEDURES FOR STUDENTS WITH SPECIAL NEEDS**

### **EMERGENCY ACTIONS**

- All Clear .....
- Emergency Damage Assessment .....
- Lockdown.....
- Secure Campus .....
- Shelter in Place .....
- Duck, Cover and Hold On .....
- Evacuation .....
- Off-site Evacuation .....
- Structured Reunification .....

### **EMERGENCY RESPONSES (Alphabetical Index)**

- Aircraft Crash .....
- Air Pollution Alert .....
- Animal Disturbance .....
- Bomb Threat .....
- Chemical Accident/Hazardous Materials .....
- Drive By Shooting .....
- Earthquake .....
- Explosion .....
- Fire .....
- Flood .....
- Gas/Fumes .....
- Hostage Situation .....
- Intruder (Active Shooter – See Section J).....
- Tornado/Severe Weather.....
- Utility Failure .....

### **OATH / USE OF FACILITIES**

### **EVACULATION MAPS**

## LOCAL EMERGENCY TELEPHONE NUMBERS

<b>EMERGENCY</b>		<b>911</b>
<b>LAW ENFORCEMENT</b>		<b>Phone</b>
Sutter County Sheriff		(530) 822-7307
<b>FIRE</b>		<b>Phone</b>
East Nicolaus Fire Department		(530) 656-2261
Pleasant Grove Fire Department		(916) 655-3937
<b>HOSPITALS</b>	<b>Address</b>	<b>Phone</b>
Adventist Health and Rideout	726 4 <sup>th</sup> Street, Marysville, CA 95901	(530) 749-4300
<b>OTHER SERVICES</b>		
Animal Control		(530) 822-7375
Poison Control		800-222-1222
Sutter County Environmental Health		(530) 822-7400
Sutter County Public Health and Human Services		(530) 822-7327
Sutter County Superintendent of Schools		(530) 822-2900
Sutter County Office of Emergency Services		(530) 749-7520
Thorntons Gas		(530) 656-2485
Fletchers Plumbing		(530) 673-2489
Superior Well		(530) 534-1949

## EMERGENCY RESPONSE TEAM MEMBERS

<b>Name</b>	<b>Phone #</b>	<b>Role</b>
Maggie Irby	925-595-8358	Superintendent/Press Liaison
Courtney Brazil	916-521-0283	Designee
Shasta Ford	530-933-3825	Admin Assistant
Stacey Schwall	530-412-2747	Fiscal Admin
Paula Villarreal	530-681-6120	Operations
Lori Brown	530-713-7643	Transportation
Jordan Garcia	530-933-4909	Operations
Jorge Arias	530-701-6078	Safety

<b>STAFF PHONE LIST: (530) 656-2407 (landline) / (530) 933-0746 (cell)</b>		<b>Ext.</b>
Superintendent/Principal	Mrs. Maggie Irby	Ext. 14
Assistant Principal/Director of Student Services	Mrs. Courtney Brazil	Ext. 34
Administrative Assistant/Program Specialist	Ms. Shasta Ford	Ext. 10
Attendance/Enrollment/Fiscal Admin Assistant II	Ms. Stacey Schwall	Ext. 11
Director of Operations	Ms. Paula Villarreal	Ext. 28
Director of Transportation	Ms. Lori Brown	Ext. 28
Food Services Director	Ms. Carol Long	Ext. 20
Preschool Teacher	Ms. Tiffany DeAlba	Ext. 16
Preschool Teacher/Classroom Aide	Ms. Margarita Barajas	Ext. 16
Preschool Teacher	Mrs. Christina McIntosh	Ext. 17
Transitional Kindergarten Teacher	Mrs. Kristen Strong	Ext. 23
Kindergarten Teacher	Mrs. Lakeyshia Holman	Ext. 26
1st Grade Teacher	Ms. Staci Emmitt	Ext. 25
2nd Grade Teacher	Mrs. Anne Hill	Ext. 24
3rd Grade Teacher	Ms. Kimi Henry	Ext. 21
4th Grade Teacher	Mr. Cha Xiong	Ext. 22
5th Grade Teacher	Mrs. Robin Kyle	Ext. 30
6th Grade Teacher, 6th-8th Science	Mrs. Kris Schuler	Ext.31
7th Grade Teacher, 6th-8th History	Ms. Sarah Lego	Ext. 32
8th Grade Teacher, 6th-8th Math	Mrs. Tami Ortega	Ext. 33
Transportation/Grounds/Maintenance/ Custodial	Mr. Jordan Garcia	Ext. 28
Grounds/Maintenance/ Custodial/Aide/Den Staff	Mr. Jorge Arias	Ext. 22
Transportation/Aide/Custodial	Mrs. Karem Garcia	Ext. 21
Aide/Administrative Assistant	Mrs. Shannon Butler	Ext. 18
Aide/Den Staff	Ms. Michelle Gonzales	Ext. 30
Aide/Den Staff	Mrs. Debbie Scott	Ext. 24
Aide/Den Staff	Mrs. Lisa Vasquez	Ext. 25
Resource Specialist	Mrs. Kay Palmer	Ext. 19
Special Education Aide/Classroom Aide/ Food Services	Mrs. Melissa Davis	Ext. 19
School Psychologist (Wed.)	Mr. Monty Martin	Ext. 27
Speech Pathologist (Tues./Thurs.)	Mrs. Suzanne Myers	Ext. 27

## SITUATIONAL COMMUNICATION PLANS

In the event of any emergency situation during school hours, what communication procedures are in place on your site? Develop a clear plan for the following aspects of emergency response.

<p><b>911 Calls</b></p>	<ul style="list-style-type: none"> <li>• <b>When placing a 911 call: give your name, school name, and school address</b></li> <li>• <b>Give specific location of shooter, intruder, fire, hazardous material or other emergency</b></li> <li>• <b>Indicate location of incident command post</b></li> </ul>
<p><b>Mass Notification to Parents</b></p>	<p><b><u>During an emergency:</u></b></p> <p>Parents will be contacted via the school's all-call system when deemed safe to do so.</p>
	<p><b><u>After an emergency:</u></b></p> <p>Parents will be contacted via the school's all-call system when deemed safe to do so.</p>

## CRISIS TOOLBOX CHECKLIST

Determine specific needs and ensure that all of the contents are in the appropriate box/pack and are current.

- Map/Diagram of campus with evacuation sites marked
- Student/Staff emergency cards/roster
- Appropriate facility keys
- Latex gloves in Ziplock bag
- Flashlight with batteries bagged separately
- Whistle
- Large marker
- Notebook/Legal Pad
- Scissors and/or utility tool
- Post it notes
- Assorted band-aids
- Lifesavers or other hard candy
- Other items as needed

## SITE EMERGENCY PROCEDURES FOR SPECIAL NEEDS STUDENTS

1. Procedures for special needs students may need to be implemented in emergency situations such as fire, earthquake, bomb threats, etc.
2. At the beginning of each school year, an Individual Emergency Procedures Plan must be completed to accommodate each student who requires additional assistance due to a disability. This includes students with physical impairments who may require:
  - a wheelchair on a daily basis
  - specialized equipment
  - physical assistance to evacuate in a timely manner
3. Each plan requires that support staff be designated as specialized assistants during times of emergency.
4. Use the format below to complete an Individual Emergency Procedures Plan for each special needs student. Place a copy of the plans in the Site Emergency Operations Plan and with the individual classroom teacher’s emergency materials. (class roster, etc.)

Individual Student Emergency Procedures Plan		
<b>Student:</b>	<b>Room #:</b>	<b>Teacher:</b>
<b>Designated Specialized Assistants:</b> <i>(Identify two staff in this area)</i>		
<b>Required Equipment or Physical Assistance Needed to Evacuate in a Timely Manner</b> <i>(complete below)</i>		

## GENERAL EMERGENCY ACTIONS

Type	Definition
STATUS	<b>ALL CLEAR</b> communicates to students and staff that the emergency is over and normal school operations can resume.
	<b>EMERGENCY DAMAGE ASSESSMENT</b> is the inspection process used immediately following an emergency (typically students and staff are under an EVACUATION order) to determine if it is safe to resume occupancy of school facilities. An EMERGENCY DAMAGE ASSESSMENT should be performed following any event with the potential to cause damage school facilities or equipment.
RESTRICTED MOVEMENT & ACCESS	<p><b>LOCKDOWN</b> is initiated to isolate students and school staff from danger on or near the campus when movement within the school and within rooms on the campus might put students and staff in jeopardy. LOCKDOWN is used to prevent intruders from entering occupied areas of the buildings.</p> <ul style="list-style-type: none"> <li>• Lock the doors</li> <li>• Close and lock windows, and close blinds or cover windows</li> <li>• Turn off lights</li> <li>• Silence all electronic devices</li> <li>• Remain silent</li> <li>• Use strategies to silently communicate with first responders, if possible</li> <li>• Hide along the wall closest to the exit but out of the view from the hallway (allowing for an ambush of the intruder and for possible escape if the intruder enters the room)</li> <li>• Remain in place until the release from lockdown by school administration or evacuated by law enforcement.</li> </ul>
	<b>SECURE CAMPUS</b> is implemented as a precautionary measure to ensure the safety of students and staff when there is danger in the surrounding community, or a bomb threat is made against the school. SECURE CAMPUS requires that all students and staff take shelter in school buildings and lock all exterior doors. Classroom instruction and/or activity may continue as long as all classroom and office doors are locked, and all students and staff remain inside through the duration of that event. The school perimeter should be secured.
	<b>SHELTER IN PLACE</b> is implemented when there is a need to isolate students and staff from the outdoor environment to prevent exposure to airborne contaminants. The procedures include closing and sealing doors, windows, and vents; shutting down the classroom/building heating, ventilation, and air conditioning systems to prevent exposure to the outside air; and turning off pilot lights. SHELTER IN PLACE allows for the free movement of staff and students within the building, although one should not leave the room until further instructions are received. Those in buildings with exterior passageways must remain in the classroom while SHELTER IN PLACE is instituted. It is appropriate for, but not limited to, gas leaks, external chemical release, bombs, and hazardous material spills.
	<p><b>DUCK, COVER AND HOLD ON</b> is the action taken during an earthquake to protect students and staff from flying and falling debris. All students and staff should:</p> <ul style="list-style-type: none"> <li>✓ Face the wall with backs to the windows</li> <li>✓ Crouch down on knees and elbows</li> <li>✓ Hands covering the back of their head/neck</li> </ul> <p>DUCK, COVER AND HOLD ON is an appropriate action for use during an earthquake, explosion, or severe weather. Immediate EVACUATION and an EMERGENCY DAMAGE ASSESSMENT must be performed prior to occupancy of any of the site's buildings, following any event prompting the use of DUCK, COVER AND HOLD ON.</p>



<b>EVACUATION</b>	<b>EVACUATION</b> is implemented when conditions make it unsafe to remain inside the building(s). This action provides for the orderly movement of students and staff along prescribed routes from inside school buildings to a designated outside area of safety.
	<b>OFF-SITE EVACUATION</b> is implemented when it is unsafe to remain on the school campus, and evacuation to an off-site assembly area is required. This action provides for the orderly movement of students and staff along prescribed routes from inside school buildings to a designated area of safety off campus. In some situations, OFF-SITE EVACUATION may require the use of busing. <b>STRUCTURED REUNIFICATION</b> should be used following any OFF-SITE EVACUATION.
	<b>EARLY RELEASE</b> Certain situations may require releasing students from school at a time when parents expect their children to be at the school site. <b>EARLY RELEASE</b> may be implemented when circumstances make keeping students at school inadvisable. <b>EARLY RELEASE</b> must be authorized by the district superintendent or designee. During an <b>EARLY RELEASE</b> , students follow normal dismissal procedures.
<b>REUNIFICATION</b>	<p><b>STRUCTURED REUNIFICATION</b> is the process used to reunify children with their parents, guardians or caregivers, following a school emergency. Regular dismissal procedures are not followed. <b>STRUCTURED REUNIFICATION</b> requires:</p> <ul style="list-style-type: none"> <li>• Maintaining accurate information on the location of each child.</li> <li>• Preventing unauthorized individuals from having access to or removing children.</li> <li>• Verifying the identity of individuals coming to take custody of children.</li> <li>• Verifying each individual has the legal right to take custody the child for which they have asked.</li> <li>• Keeping record of who each student is released to, the method used to verify their identity and the time of the pick-up.</li> </ul>

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**EMERGENCY RESPONSE**
**AIRCRAFT CRASH**


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It is important that staff and students understand the procedures if an aircraft falls within the perimeter of the Marcum- Illinois Union School grounds. The warning, if any, may come in the form of a sound of a crash, an explosion, or through observation. Emergency response will depend on the size of the aircraft, nature of the crash, and proximity to the school.

**STAFF ACTIONS:**

- θ Notify Principal/Designee
- θ Move students away from the immediate vicinity of the crash.
- θ Crash Inside Building: Staff will initiate **DUCK, COVER, HOLD ON** action. Principal/Designee will determine if students are to remain inside or **EVACUATE**.
- θ Crash Outside: Move students away from immediate vicinity of the crash. Principal will determine if students are to return to classrooms or assemble outside.
  - θ Take roll, and report to the principal/designee
  - θ Remain in decided upon location with students unless subsequent explosions or fire endanger the area.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- θ Notify police and fire department (call 911).
- θ Initiate **SHELTER IN PLACE**, if warranted.
- θ Initiate **DUCK, COVER, HOLD ON** for students and staff outside or direct them to designated area until further instructions are received.
- θ Ensure that students and staff remain at a safe distance from the crash.
- θ Contact the Sutter County Office of Emergency Services.
- θ Account for all building occupants and determine extent of injuries.
- θ Fire department officials will secure area to prevent unauthorized access. Do not enter affected areas until the appropriate authorities provide clearance to do so.

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**EMERGENCY RESPONSE****AIR POLLUTION ALERT**

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Severe air pollution may affect students and staff who are susceptible to respiratory problems. These are persons with chronic lung disease or asthma, the elderly, the chronically ill and exercising children and adults.

Activities will be restricted when air quality reached stage two (Unhealthy for Sensitive Groups) on the Air Quality Index, or when the media announces a Spare the Air Day (126 AQI threshold).

**STAFF ACTIONS:**

- θ Remain indoors with students whenever possible.
- θ Minimize strenuous physical activity.
- θ Keep windows and doors closed.
- θ Resume normal activities after the **ALL CLEAR** signal is given.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- θ Develop and maintain a file of students and staff who have or are susceptible to respiratory problems.
- θ Communicate alternate programs or locations available to sensitive persons during an air pollution episode with teachers and support staff.
- θ When notified by the district office or news media of a smog advisory, inform all staff to stay indoors and minimize strenuous physical activity.
- θ Cancel all outdoor athletic competitions and practices and any other activities that require strenuous physical activity.

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**EMERGENCY RESPONSE****ANIMAL DISTURBANCE**

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If there is a rabid or uncontrollable animal on campus, implement this procedure when any wild animal threatens the safety of the students and staff.

**STAFF/TEACHER ACTIONS:**

- θ If the animal is outside, keep students inside. Lock doors and keep students away from the windows.
- θ If the animal is inside, **EVACUATE** students to a sheltered area away from the animal.
- θ Notify the principal and report any injuries.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- θ Isolate the students from the animal. Close doors or use available barricades to isolate the animal if possible.
- θ If the animal is outside, keep students inside and institute **SECURE CAMPUS**.
- θ If the animal is inside, initiate an **EVACUATION** outside to a protected area away from the animal
- θ Contact Sutter County Animal Control at (530) 822-7375 for assistance in removing the animal.
- θ If the animal injures anyone, seek medical assistance from the office.
- θ Notify parent/guardian and recommended health advisor.

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**EMERGENCY RESPONSE****BOMB THREAT**

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If the school receives a bomb threat by telephone, follow the Bomb Threat Checklist on the **next page** to document information about the threat. Keep the caller on the telephone as long as possible and listen carefully to all information the caller provides. Make a note of any voice characteristics, accents, or background noises and complete the Bomb Threat Report as soon as possible.

**PERSON RECEIVING THREAT BY TELEPHONE:**

- θ Listen. Do not interrupt caller.
- θ Keep the caller on the line with statements such as *"I am sorry, I did not understand you. What did you say?"*
- θ If possible, alert someone else to notify the telephone company to trace the call while the caller is on the line.
- θ Notify site administrator immediately after completing the call. Office to call 911.
- θ Complete the Bomb Threat Checklist on following page.

**PERSON RECEIVING THREAT BY MAIL:**

- θ Note the manner in which the threat was delivered, where it was found and who found it.
- θ Limit handling of item by immediately placing it in an envelope so that fingerprints may be detected. Written threats should be turned over to law enforcement.
- θ Caution students against picking up or touching any strange objects or packages.
- θ Notify principal or site administrator.

**STAFF ACTIONS:**

- θ If ordered **EVACUATE** students as quickly as possible, using primary or alternate routes.
- θ Leave the room unlocked and turn off the lights as you leave.
- θ While evacuating, visually scan for anything suspicious or out of place. Immediately report findings to principal/designee.
- θ Do not return to the building until emergency response officials determine it is safe.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- θ Call 911.
- θ If the caller is still on the phone, contact the phone company to trace the call. Tell the telephone operator the name of school, name of caller, phone number on which the bomb threat came in. This must be done quickly since the call cannot be traced once the caller has hung up.
- θ Instruct staff and students and staff to turn off any cell phones or two-way radios. Do not use those devices during this threat since explosive devices can be triggered by radio frequencies.
- θ Determine whether to **EVACUATE** the threatened building and adjoining buildings. If the suspected bomb is in a corridor, modify evacuation routes to bypass the corridor.
- θ Use the intercom, personal notification by designated persons, or the PA system to evacuate the threatened rooms.
- θ If it is necessary to **EVACUATE** the entire school, use the fire alarm.
- θ Direct a search team to look for suspicious packages, boxes or foreign objects.
- θ Do not return to the school building until it has been inspected and determined safe by proper authorities.
- θ Avoid publicizing the threat any more than necessary.

# EMERGENCY RESPONSE

# BOMB THREAT CHECKLIST

## BOMB THREAT CALL PROCEDURES

Most bomb threats are received by phone. Bomb threats are serious until proven otherwise. Act quickly, but remain calm and obtain information with the checklist on the reverse of this card.

**If a bomb threat is received by phone:**

1. Remain calm. Keep the caller on the line for as long as possible. **DO NOT HANG UP**, even if the caller does.
2. Listen carefully. Be polite and show interest.
3. Try to keep the caller talking to learn more information.
4. If possible, write a note to a colleague to call the authorities or, as soon as the caller hangs up, immediately notify them yourself.
5. If your phone has a display, copy the number and/or letters on the window display.
6. Complete the Bomb Threat Checklist (reverse side) immediately. Write down as much detail as you can remember. Try to get exact words.
7. Immediately upon termination of the call, do not hang up, but from a different phone, contact FPS immediately with information and await instructions.

**If a bomb threat is received by handwritten note:**

- Call \_\_\_\_\_
- Handle note as minimally as possible.

**If a bomb threat is received by email:**

- Call \_\_\_\_\_
- Do not delete the message.

**Signs of a suspicious package:**

- No return address
- Excessive postage
- Stains
- Strange odor
- Strange sounds
- Unexpected delivery
- Poorly handwritten
- Misspelled words
- Incorrect titles
- Foreign postage
- Restrictive notes

**DO NOT:**

- Use two-way radios or cellular phone; radio signals have the potential to detonate a bomb.
- Evacuate the building until police arrive and evaluate the threat.
- Activate the fire alarm.
- Touch or move a suspicious package.

## WHO TO CONTACT (select one)

- Follow your local guidelines
- Federal Protective Service (FPS) Police  
1-877-4-FPS-411 (1-877-437-7411)
- 911

## BOMB THREAT CHECKLIST

Date:  Time:

Time Caller Hung Up:  Phone Number Where Call Received:

### Ask Caller:

- Where is the bomb located?  
(Building, Floor, Room, etc.) \_\_\_\_\_
- When will it go off? \_\_\_\_\_
- What does it look like? \_\_\_\_\_
- What kind of bomb is it? \_\_\_\_\_
- What will make it explode? \_\_\_\_\_
- Did you place the bomb? Yes No \_\_\_\_\_
- Why? \_\_\_\_\_
- What is your name? \_\_\_\_\_

### Exact Words of Threat:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Information About Caller:

- Where is the caller located? (Background and level of noise) \_\_\_\_\_
- Estimated age: \_\_\_\_\_
- Is voice familiar? If so, who does it sound like? \_\_\_\_\_
- Other points: \_\_\_\_\_

Caller's Voice	Background Sounds:	Threat Language:
<input type="checkbox"/> Accent	<input type="checkbox"/> Animal Noises	<input type="checkbox"/> Incoherent
<input type="checkbox"/> Angry	<input type="checkbox"/> House Noises	<input type="checkbox"/> Message read
<input type="checkbox"/> Calm	<input type="checkbox"/> Kitchen Noises	<input type="checkbox"/> Taped
<input type="checkbox"/> Clearing throat	<input type="checkbox"/> Street Noises	<input type="checkbox"/> Irrational
<input type="checkbox"/> Coughing	<input type="checkbox"/> Booth	<input type="checkbox"/> Profane
<input type="checkbox"/> Cracking voice	<input type="checkbox"/> PA system	<input type="checkbox"/> Well-spoken
<input type="checkbox"/> Crying	<input type="checkbox"/> Conversation	
<input type="checkbox"/> Deep	<input type="checkbox"/> Music	
<input type="checkbox"/> Deep breathing	<input type="checkbox"/> Motor	
<input type="checkbox"/> Disguised	<input type="checkbox"/> Clear	
<input type="checkbox"/> Distinct	<input type="checkbox"/> Static	
<input type="checkbox"/> Excited	<input type="checkbox"/> Office machinery	_____
<input type="checkbox"/> Female	<input type="checkbox"/> Factory machinery	_____
<input type="checkbox"/> Laughter	<input type="checkbox"/> Local	_____
<input type="checkbox"/> Lisp	<input type="checkbox"/> Long distance	_____
<input type="checkbox"/> Loud		
<input type="checkbox"/> Male		
<input type="checkbox"/> Nasal		
<input type="checkbox"/> Normal		
<input type="checkbox"/> Ragged		
<input type="checkbox"/> Rapid		
<input type="checkbox"/> Raspy		
<input type="checkbox"/> Slow		
<input type="checkbox"/> Slurred		
<input type="checkbox"/> Soft		
<input type="checkbox"/> Stutter		

**Other Information:**

\_\_\_\_\_

\_\_\_\_\_



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**EMERGENCY RESPONSE**
**CHEMICAL ACCIDENT**


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Warning of a chemical accident is usually received from the fire or police departments when such an accident occurs sufficiently near the school to be a threat to the safety of the students. The school is alert to exposure to safety hazards, such as toxins from nearby spraying of farm crops. The Agricultural Commissioner's Office will be notified when sprayers get too close to the school during times that students are present.

**PERSON DISCOVERING SPILL:**

- θ Alert others in immediate area to leave the area.
- θ Close doors and restrict access to affected area.
- θ Notify principal/designee.

**STAFF ACTIONS:**

- θ If chemical accident is off-site, **SHELTER-IN-PLACE**. Close all doors and windows, shut off ventilation, and monitor the radio/phones. If necessary, use tape, rags, clothing, or any other available material of seal air leaks.
- θ If you believe that gas is entering the building, protect everyone with a wet cloth or towel over the mouth and nose. Have everyone breathe in short, quick shallow breaths.
- θ If chemical accident is on-site, **EVACUATION** is implemented. Direct all students to report to nearest designated building or assembly area.
- θ Upon arrival at safe site, take attendance to be sure all students have been evacuated and accounted for. Notify principal/site administrator of any missing students.
- θ Prepare for potential **OFF-SITE EVACUATION**.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- θ Notify Fire Department and the Department of Public Health. Provide the following information:
  - School name and address, including nearest cross street(s)
  - Location of the spill and/or materials released
  - Characteristics of spill (color, smell, visible gases)
  - Name of substance, if known
  - Injuries, if any
- θ Notify Maintenance/Building and Grounds Manager to shut off mechanical ventilating systems.
- θ Determine whether to implement **SHELTER IN PLACE, EVACUATION** (upwind from the accident), and/or student release.
- θ Post a notice on the school office door stating location of alternate school site.



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**EMERGENCY RESPONSE****DRIVE BY SHOOTING**

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With the availability of weapons and the increase in gang activity, it is possible that a drive-by shooting could occur at or near a school site. The immediate concern is the safety of students and staff.

**STAFF ACTIONS:**

- θ If it is suspected that gunshots may be fired from a passing vehicle, have students and other staff members lie flat on the ground and keep as low as possible.
- θ If safe, look at the vehicle and attempt to identify
  - License plate number
  - Type of vehicle
  - Occupants
  - Weapons
- θ Notify main office.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- θ Call 911.
- θ Activate **SECURE CAMPUS**. Students should move quickly and safely to classrooms.
- θ Assess injuries. If possible, move injured to a safe location. Do not move severely injured unless imminent danger exists.
- θ Direct media to the Superintendent.

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**EMERGENCY RESPONSE**
**EARTHQUAKE**


---

Earthquakes strike without warning. The effect of an earthquake from one building to another will vary: Freestanding bookshelves may topple, wall-mounted objects may loosen and fall, ceiling components may fall, door frames may be bent by moving walls and may jam doors shut, moving walls may bend window frames, causing glass to shatter, sending dangerous shards into the room, the accompanying noise may cause considerable stress. The major shock is usually followed by numerous aftershocks, which may last for weeks.

The major threat of injury during an earthquake is from falling objects, glass shards and debris. Many injuries are sustained while entering or leaving buildings. Therefore, it is important to quickly move away from windows, free-standing partitions and shelves and take the best available cover under a sturdy desk or table, in a doorway or against an inside wall. All other actions must wait until the shaking stops. If persons are protected from falling objects, the rolling motion of the earth may be frightening but not necessarily dangerous.

**STAFF ACTIONS:**

- θ If inside a building, give **DROP, COVER and HOLD ON** command. Instruct students to move away from windows, bookshelves and heavy suspended light fixtures. Get under tables, desks, or other sturdy furniture with back to windows.
- θ If outside, move students away from buildings, trees, overhead wires, and poles. Get under a stable structure (such as the playground). Otherwise, drop to knees, clasp both hands behind neck, bury face in arms, make body as small as possible, close eyes, and cover ears with forearms. If notebooks or jackets are handy, hold over head for added protection. Maintain this position until shaking stops.
- θ After shaking stops, check for injuries and render First Aid.
- θ After shaking stops, **EVACUATE** to designated location. Do not return to the building. Avoid evacuation routes with heavy architectural ornaments over the entrances. Bring attendance roster and emergency backpack.
- θ Check attendance at the assembly area. Report any missing students to principal/site administrator.
- θ Warn students to avoid touching electrical wires and keep a safe distance from any downed power lines.
- θ Stay alert for aftershocks.
- θ Do NOT re-enter building until it is determined to be safe, and **ALL CLEAR** is given.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- θ Once shaking stops, initiate **EVACUATION**. Direct Secretary to call 911.
- θ Determine if situation warrants forming a search and rescue team to find missing students.
- θ Direct custodians to evaluate overall campus condition and take any precautionary actions with gas, electricity, etc. Report building damage and suspected breaks in utility lines or pipes to fire department responders.
- θ Do NOT give **ALL CLEAR** to re-enter building until it is determined to be safe by appropriate facilities inspector.
- θ Determine whether to close school. If school must be closed, notify staff members, students, and parents.

**During non-school hours**

- θ Inspect school buildings with Maintenance team to assess damage and determine corrective actions.
- θ Determine the advisability of closing the school.
- θ Notify fire department and utility company of suspected breaks in utility lines or pipes.
- θ If school must be closed, notify staff members, students and parents.

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**EMERGENCY RESPONSE**


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**EXPLOSION**

Emergency response will depend on the type of explosion (smoke bomb, chemical lab incident, etc.) and proximity to the school. All students should be kept away from the explosion and under supervision.

**STAFF ACTIONS:**

- ∅ Initiate **DROP, COVER AND HOLD ON**.
- ∅ If explosion occurred inside the school building, **EVACUATE** to outdoor assembly area. Keep students and staff at a safe distance from the building(s).
- ∅ Render first aid as necessary.
- ∅ Do not return to the building until the emergency response personnel determine it is safe to do so.
- ∅ If explosion occurred in the surrounding area, initiate **SHELTER IN PLACE**. Keep students at a safe distance from site of the explosion.

**PRINCIPAL/SITE ADMINISTRATOR:**

- ∅ Determine whether site evacuation should be implemented. If so, sound fire alarm. This will automatically implement action to **EVACUATE** the building. **EVACUATION** may be warranted in some buildings, but others may be used for **SHELTER IN PLACE**.
- ∅ Notify Fire Department (call 911). Provide school name, address, exact location within the building, your name and phone number and nature of the emergency.
- ∅ Secure area to prevent unauthorized access until the Fire Department arrives.
- ∅ Notify emergency response personnel of any missing students.
- ∅ Notify utility company of breaks or suspected breaks in utility lines or pipes. Provide school name, address, location within building, your name and phone.
- ∅ Direct a systematic, rapid and thorough approach to search the building and surrounding areas. Check classrooms and work areas, public areas (foyers, offices, bathrooms and stairwells), unlocked closets, exterior areas (shrubbery, trash cans, debris boxes) and power sources (computer rooms, gas valves, electric panels, telephone panels).
- ∅ Determine if Student Release should be implemented. If so, notify staff, students, and parents.

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**EMERGENCY RESPONSE**
**FIRE**


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Should any fire endanger the students or staff, it is important to act quickly and decisively to prevent injuries and contain the spread of the fire. All doors leading to the fire should be closed. Do not re-enter the area for belongings. If the area is full of smoke, students and employees should be instructed to crawl along the floor, close to walls, which will make breathing easier and provide direction. Before opening any door, place a hand an inch from the door near the top to see if it is hot. Be prepared to close the door quickly at the first sign of fire. All fires, regardless of their size, which are extinguished by school personnel, require a call to the Fire Department.

**STAFF ACTIONS:**

- θ If directed, or alarm sounds, **EVACUATE** students from the building using primary or alternate fire routes. Take emergency folder. Maintain control of the students a safe distance from the fire and firefighting equipment.
- θ Take attendance. Report missing students to the principal/designee and emergency response personnel.
- θ Maintain supervision of students until the Fire Department determines it is safe to return to the school building and **ALL CLEAR** is given.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- θ Sound the fire alarm to implement **EVACUATION** of the building.
- θ Immediately **EVACUATE** the school using the primary or alternate fire routes.
- θ Notify the Fire Department (call 911).
- θ Direct search and rescue team to be sure all students and personnel have left the building.
- θ Ensure that access roads are kept open for emergency vehicles.
- θ Notify appropriate utility company of suspected breaks in utility lines or pipes.
- θ If needed, initiate **OFF-SITE EVACUATION** with transportation team.
- θ Do not allow staff and students to return to the building until the Fire Department declares that it is safe to do so.

**Fire Off-Site/Near the School**

- θ Notify the Fire Department (call 911). The Fire Marshall will direct operations once on site.
- θ Determine the need to implement an **EVACUATION**. If the fire threatens the school, execute the actions above. If not, continue with school routine.

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**EMERGENCY RESPONSE**
**FLOOD**


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Flooding could threaten the safety of students and staff whenever storm water or other sources of water threaten to inundate school grounds or buildings. Flooding may occur if a water pipe breaks, or prolonged rainfall causes urban streams to rise. Flooding may also occur because of damage to water distribution systems such as failure of a dam or levee. If weather-related, an alert message will be broadcast over the weather radio station.

The extent of the flood and estimated time before it may arrive will dictate the course of action to be taken. The Superintendent will sound the appropriate warning signal.

**STAFF ACTIONS:**

- θ If warranted, **EVACUATE** students using evacuation plan. If **OFF-SITE EVACUATION** is ordered, take attendance before leaving the campus.
- θ Remain with students throughout the evacuation process.
- θ Upon arrival at the safe site, take attendance. Report any missing students to principal/designee and emergency response personnel.
- θ Do not return to school building until it has been inspected and determined safe by property authorities, and **ALL CLEAR** has been issued.

**BUS DRIVER ACTIONS:**

- θ If **OFF-SITE EVACUATION** is by bus, **DO NOT** drive through flooded streets and/or roads. **DO NOT** attempt to cross bridges, overpasses or tunnels that may be damaged by flooding.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- θ Monitor Radio Station KFBK 1530 AM and/or Television Station KCRA Channel 3.
- θ Instruct staff to stand by while it is determined if evacuation is required.
- θ Notify local police department of intent to **OFF-SITE EVACUATE**, the location of the safe evacuation site and the route to be taken to that site.
- θ Delegate a search team to assure that all students have been evacuated.
- θ Issue **OFF-SITE EVACUATION** instruction if students will be evacuated to a safer location by means of buses and cars.
- θ Post a notice on the office door stating where the school has relocated.
- θ Do not allow staff and students to return to the building until proper authorities have determined that it is safe to do so and **ALL CLEAR** has been issued.

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**EMERGENCY RESPONSE****GAS/FUMES**

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All school personnel, including cafeteria managers and custodians, shall immediately report any gas odor or suspected gas leak to the principal/designee. If an odor is detected outside the building, it may not be necessary to evacuate.

**STAFF ACTIONS:**

- θ Notify principal/designee.
- θ Move students from immediate vicinity of danger.
- θ Do not turn on any electrical devices such as lights, computers, fans, etc.
- θ If odor is severe, **EVACUATE** the area immediately.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- θ If gas leak is internal, **EVACUATE** the building immediately.
- θ Call 911.
- θ Notify utility company.
- θ Determine whether to move to alternate building location or implement **OFF-SITE EVACUATION**.
- θ Do not return to the building until it has been inspected and determined safe by proper authorities and **ALL CLEAR** has been issued.

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**EMERGENCY RESPONSE**
**HOSTAGE SITUATION**


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Hostage situations may unfold rapidly in a variety of ways. Events may range from a single perpetrator with a single hostage to several perpetrators with many hostages. Specific actions by school staff will be limited pending arrival of law enforcement officers. It is their responsibility to bring the situation to a successful conclusion. When as much of the school has been evacuated as can be accomplished, school staff should focus on providing support as needed to the police department, communicating with parents, and providing counseling for students.

**HOSTAGE ACTIONS:**

- θ Obey captor's orders, being courteous and polite. Do not become antagonistic.
- θ Do not debate, argue, or discuss political issues with captors or other hostages.
- θ Talk in a normal voice. Avoid whispering when talking to hostages and avoid raising your voice when talking to captors.
- θ Avoid abrupt movements. Keep movement to a minimum and in view.
- θ Locate yourself and any students away from windows/doors and as far away from the terrorist as possible.
- θ Answer all questions unless your position may pose a threat to terrorist captors or to their ideologies.
- θ Inform captors of any medical conditions or special disabilities of all hostages.
- θ Do not discuss possible actions to be taken by other agencies, school district, colleagues, media, or parents.
- θ **STAY CALM.**

**STAFF ACTIONS:**

- θ All students and staff who are on site but not in imminent danger should implement **LOCKDOWN** procedures.
- θ Alert the principal/site administrator.
- θ Account for all students.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS**

- θ Call 911. Provide all known essential details of the situation:
  - Number of hostage takers and description
  - Type of weapons being used
  - Number and names of hostages
  - Any demands or instructions the hostage taker has given
  - Description of the area



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- θ Identify an assembly area for responding officers away from the hostage situation. Have school liaison wait at assembly area for police to arrive.
- θ Protect building occupants before help arrives by initiating a **LOCKDOWN** or **EVACUATION** (or combination of both) for all, or parts, of the building.
- θ Secure exterior doors from outside access.
- θ When police arrive, assist them in a quiet, orderly evacuation away from the hostage situation.
- θ Gather information on students and/or staff involved and provide the information to the police. If the parent of a student is involved, gather information about the child.
- θ Identify media staging area, if appropriate. Implement a hotline for parents.
- θ Account for students as they are evacuated.
- θ Provide recovery counseling for students and staff.

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**EMERGENCY RESPONSE**
**INTRUDER**


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**\*SEE SECTION J FOR ACTIVE SHOOTER/ARMED ASSAILANT TACTICAL PROCEDURES\***

To prevent intruders on campus, keep doors secure, use sign-in sheets for visitors and cameras and staff to monitor entryways.

**STAFF ACTIONS:**

- θ Notify the principal/site administrator. Provide description and location of the intruder. Visually inspect the intruder for indications of a weapon.
- θ Keep intruder in view until police or law enforcement arrives. Stay calm. Do not indicate any threat to the intruder.
- θ Isolate intruder from students. Initiate **LOCKDOWN** procedures until **ALL CLEAR** instruction is announced.

**PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- θ Initiate **LOCKDOWN**.
- θ Request intruder to leave campus. Remain calm. Be courteous and confident. Keep distance from the intruder. Speak in soft, non-threatening manner. Avoid hostile-type actions, except in cases when necessary to safeguard person or property. Listen to the intruder. Give him or her an opportunity to vent. Attempt to be helpful. When talking to the intruder, use phrases such as:
  - “What can we do to make this better?”*
  - “I understand the problem, and I am concerned.”*
  - “We need to work together on this problem.”*
- θ As soon as the conversation or actions of the individual become threatening or violent, call 911 immediately. Provide description and location of intruder.
- θ Keep subject in view until police or law enforcement arrives.
- θ Take measures to keep subject away from students and building.
- θ Designate an administrator or staff member to coordinate with public safety at their command post; provide a site map and keys to public safety personnel.
- θ When scheduling a meeting with an individual known to be aggressive, arrange for another staff member to be present.
- θ Be available to deal with the media and bystanders and keep site clear of visitors.

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## **EMERGENCY RESPONSE    TORNADO/SEVERE WEATHER**

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Tornados are relatively short-lived local storms. They are composed of violently rotating columns of air that descend in a funnel shape from thunderstorm cloud systems and usually develop during severe thunderstorms. Tornados occur most frequently in the months of April, May, and June.

***The national weather service will issue a warning over the emergency broadcast system in event of severe weather conditions.***

Tornado Watch: When weather conditions are favorable to their formation, an eye should be kept on the weather. At the first sign of any indications of a possible tornado, shelter should be taken.

Tornado Warning: When a tornado funnel is sighted or indicated by radar, shelter should be taken immediately.

### **STAFF ACTIONS:**

- θ Follow **SECURE CAMPUS** procedures.
- θ If a funnel cloud is sighted, or you are directed, follow **DUCK, COVER, HOLD ON** procedures, **with the addition that students must place themselves along the innermost walls of the building.**
- θ **EVACUATE** after the initial danger if instructed to do so.

### **PRINCIPAL/SITE ADMINISTRATOR ACTIONS:**

- θ If warning is received from weather service, initiate **SECURE CAMPUS.**
- θ If a funnel cloud is sighted, initiate **DUCK, COVER, HOLD ON. Students must place themselves along the innermost walls of the building.**
- θ Initiate fire alarm to signal **EVACUATION** after the initial danger, if necessary.

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**EMERGENCY RESPONSE**
**UTILITY FAILURE**


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Failure of any of the utilities (electricity, gas, water) during school hours constitutes a condition that must be dealt with on a situational basis. Advance notice may be received from a utility company regarding loss of service. In many cases, such loss of service will be of short duration and require no special action other than notifying staff of the temporary interruption of service.

**PRINCIPAL/SITE ADMINISTRATOR:**

- θ Notify utility company. Provide the following information:
  - Affected areas of the school site
  - Type of problem or outage
  - Expected duration of the outage, if known
- θ Determine length of time service will be interrupted.
- θ Determine desired action, which may include relocation of students and staff, notification of parents, and alternate food service.
- θ If disruption in service will severely hamper school operation, notify students and staff by appropriate means.
- θ Use messengers with oral or written word as an alternate means of faculty notification.
- θ Implement plan to provide services without utilities or with alternate utilities.

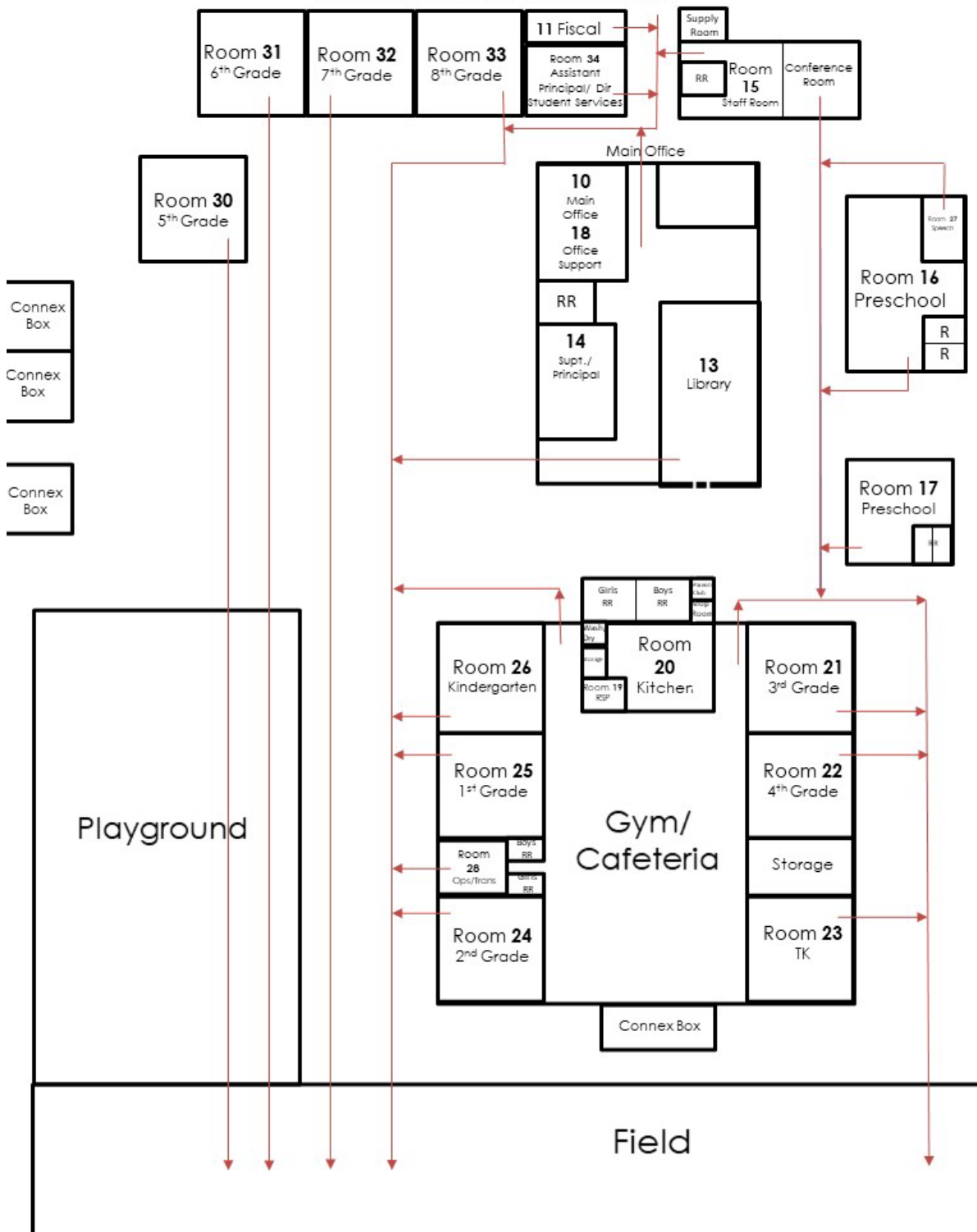
**Plan for Loss of Water, Electricity, or Gas**

If water, electricity, or gas is temporarily unavailable on campus, short-term solutions may be considered until services resume. If there is an extended loss of water, campus will be closed at the discretion of the Superintendent or designee.

# On-Site Evacuation Map

## Marcum-Illinois School Map

2452 El Centro Blvd., East Nicolaus, CA 95659



## Off-Site Evacuation Maps

### Evacuation by Foot: SSRA Hall

2430 Palm Ave, East Nicolaus, CA 95659 / (530)656-2485



### Evacuation by Bus: East Nicolaus High School

2454 Nicolaus Ave, Nicolaus, CA 95659 / (530)656-2255



## OATH OF AFFIRMATION

### **Marcum-Illinois Union Elementary School District – Administrative Regulation 4112.3**

All public employees are disaster service workers. As such, before beginning employment with the District, employees must take the oath or affirmation required by law. In the event of natural, manmade or war-caused emergencies which result in conditions of disaster or extreme peril to life, property and resources, all District employees are subject to disaster service activities as assigned to them by their supervisors.

### **Government Code – 3100**

It is hereby declared that the protection of the health and safety and preservation of the lives and property of the people of the state from the effects of natural, manmade, or war-caused emergencies which result in conditions of disaster or in extreme peril to life, property, and resources is of paramount state importance requiring the responsible efforts of public and private agencies and individual citizens. In furtherance of the exercise of the police power of the state in protection of its citizens and resources, all public employees are hereby declared to be disaster service workers subject to such disaster service activities as may be assigned to them by their supervisors or by law.

(Amended by Stats. 1971, Ch. 38.)

## USE OF SCHOOL FACILITIES

### **Marcum-Illinois Union Elementary School District - Board Policy 3516**

The Board shall grant the use of school buildings, grounds, and equipment to public agencies, including the American Red Cross, for mass care and welfare shelters during disasters or other emergencies affecting the public health and welfare. The Board shall cooperate with such agencies in furnishing and maintaining whatever services it deems necessary to meet the community's needs.



## C. Suspension & Expulsion Policies

The Education Code clearly identifies the student actions that are grounds for suspension and expulsion. Students may be suspended or expelled from Marcum-Illinois Union Elementary School depending upon the behavior. Grounds for suspension and expulsion include but are not limited to:

- Attempts, threats or actions that causes physical injury to another.
- Unauthorized possession of a dangerous object (or imitation) or substance (i.e., knife, firearm, explosive material).
- Use, sale or possession of a prohibited substance (i.e., alcohol, drug, or nicotine product).
- Commits or attempts to commit robbery or extortion or knowingly receives stolen property.
- Cause or attempts to cause damage to school or private property.
- Commits an obscene act or habitual vulgarity or profanity.
- Committed or attempted sexual assault/sexual battery
- Harassment of other students.
- Terrorist or hate threats against school officials or school property.

Students who are referred for suspension or expulsion are reported to administration. In non-emergency situations, an informal conference will be held to clarify the reason for the disciplinary action and to clarify the events or evidence. At the time of the suspension, a staff member will contact the student's parent/guardian regarding the suspension and notify the parent/guardian of the suspension in writing. The school may request to meet with the parent/guardian about the suspension. Under state law (Education Code 48914) the parent is then obligated to meet with school staff without delay. Suspensions are effective immediately. Suspended students are not allowed to be on school property, participate in school activities, or attend DEN during the period of the suspension. Suspended students are responsible for contacting their teacher to make up missed assignments.

A student will not be suspended from school for more than five days unless the student is recommended for an expulsion. When the Board is considering a suspension or disciplinary action (except expulsion) a closed hearing will be held to avoid violating a student's right to privacy (Education Code 49073-49079).

Students who are suspended for more minor offenses may participate in an in-school suspension program if that program is available. Major offenses are grounds for expulsion.

Note: This is a brief summary of a long and detailed policy and process. For specific steps and processes, see the Board Policy and Administrative Regulations. These may be requested through the school.

**References: Board Policy 5144.1 (a-e) and Administrative Regulations 5144.1 (a-u), 5144.2 (a-i)**



## D. Procedures for Notifying Teachers of Dangerous Pupils

*In order to fulfill the requirements made by Education Code 49079 and Welfare and Institutions Code 827 that state teachers must be notified of the reason(s) a student has been suspended, Marcum-Illinois Union Elementary School will promptly and confidentially communicate reason for current or past student suspensions as necessary. The information will be provided to the student's current teachers only. All information regarding suspension and expulsion is **CONFIDENTIAL** and will not to be shared with any student(s) or parent(s).*

## E. Discrimination & Harassment Policy

Marcum-Illinois Union Elementary School desires to provide a safe school environment that allows all students equal access and opportunities in the district's academic and other educational support programs, services, and activities. Discrimination or harassment based on ethnicity, gender, race, social class, religion, disability, nationality, sexual orientation, physical appearance, or some other factor is strictly prohibited. Our school strives to convey the attitude that all children can achieve academically and behave appropriately, while at the same time appreciating and accepting individual differences. Marcum-Illinois Union Elementary School endeavors to communicate to students and the greater community that all students are valued and respected.

In order to maximize the successful education of all students and help them become productive citizens and lifelong learners in a diverse society, all individuals including student, parents, staff and community members:

- Shall be treated with dignity, respect, and fairness.
- Shall be encouraged to maintain high expectations.
- Shall strive to model an appreciation for socio-economic, cultural, ethnic, gender and religious diversity.
- Shall aspire to contribute to an environment of mutual respect, caring and cooperation.

Students who engage in discrimination, harassment, intimidation, bullying, or retaliation shall be subject to appropriate discipline, up to and including counseling, suspension, and/or expulsion. Any employee who permits or engages in prohibited discrimination, harassment, intimidation, bullying, or retaliation shall be subject to disciplinary action, up to and including dismissal.

**References: Board Policy 5145.3**

## F. School-wide Dress Code Prohibiting Gang Attire

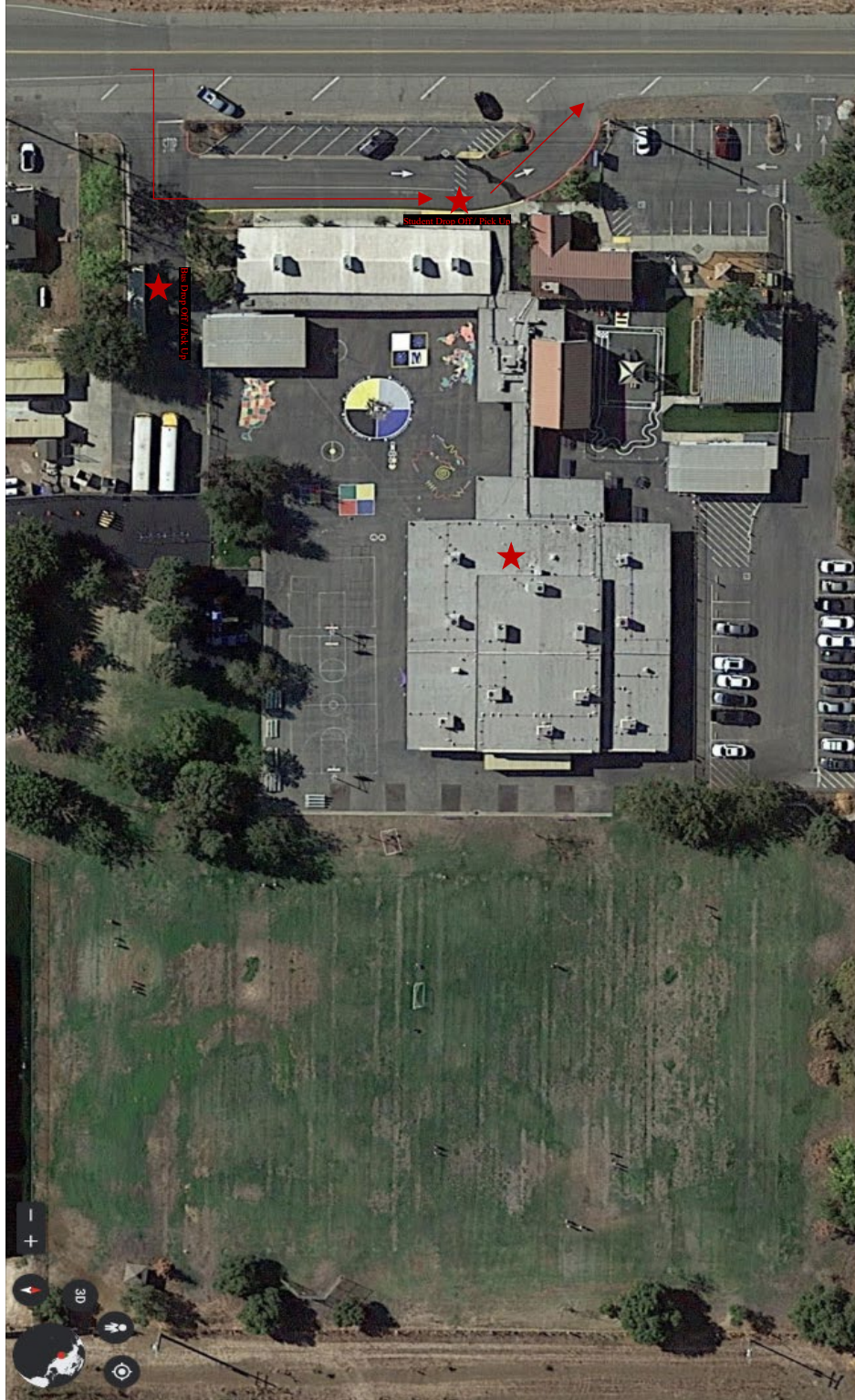
The Marcum-Illinois Union Elementary Dress Code intends to maintain a safe and productive learning environment for all students.

1. Shoes will be worn at all times. All shoes must close around the ankle and have a hard sole. No flip flops, slides, or slippers.
2. Extremely brief garments that are a distraction to the educational environment are not appropriate. Clothing shall be sufficient to conceal undergarments at all times. Tank top straps must be at least 2-fingers wide. Shorts, skirts, dresses, rompers, etc. must extend to fist length. Holes in pants/jeans or shorts must be below fist length or have patches to cover skin.
3. Clothing or accessories shall be free of writing, pictures, or any other insignia which are crude, violent, obscene, or sexually suggestive or which advocate racial, ethnic, religious, or other prejudice, or the use of tobacco, drugs or alcohol.
4. Earrings, jewelry, or accessories, which present a safety hazard to the wearer or others, are not suitable for school wear.
5. Only prescription sunglasses may be worn in class. Other types of sunglasses may be worn on campus outside of class.
6. Identified gang attire such as bandanas, haircuts or hair rollers, or any gang paraphernalia are prohibited.
7. Students are allowed to wear sun protective clothing, including hats, while outdoors during the school day.

**References: Board Policy 5132**

# G. Safe Ingress and Egress

The following map and materials outline the procedures for safe ingress and egress from Marcum-Illinois Union Elementary School. Items marked with an \* are considered to be “tactical information” that will be withheld from the public view version of this plan.



→ Drop Off/Pick Up Traffic Flow  
★ \*Arrival/Dismissal Supervision Post (7-8:30am, 2:45-3:10pm)

**Campus Access Procedures:**  
When school is in session, all visitors must go directly to the school office to register and obtain a \*signed\* identification badge before going into instructional areas.  
(Penal Code 627.6)

## H. Safe and Orderly Environment

### School Mission Statement:

The mission of the Marcum-Illinois Union Elementary School District is to provide a high-quality education for every student in the district.

### School Vision Statement:

All stakeholders of Marcum-Illinois Union Elementary School District commit to act in collaboration and to openly support our district's students in their pursuit of a quality education.

### Policies & Procedures on Positive School Climate

To maintain a positive school climate, behavior expectations are detailed in our ROAR Behavior Matrix below. Students are expected to follow the positive behaviors detailed in this matrix any time they are on school property and during any school fieldtrip. The four main expectations for positive school behavior include:

1. Be Respectful
2. Be Organized
3. Be Accepting of self/others
4. Be Responsible

# I. Rules and Procedures on School Discipline

Marcum-Illinois Union School District is dedicated to ensuring that our campus is safe for everyone. Therefore, students are expected to follow the positive behaviors detailed in the ROAR behavior matrix and may be recommended for a referral, detention, suspension, or expulsion based on the severity of the infraction.

## **Rules and Consequences**

The Marcum-Illinois School Rules are:

1. Be Respectful
2. Be Organized
3. Be Accepting of self/others
4. Be Responsible

If a student chooses to break a rule, the following consequences may be applied at the discretion of the teacher:

1. Warning
2. Appropriate "time out"/consequence
3. Parents contacted by phone or note
4. Conference between parent, teacher and/or principal, and possibly the student

## **REFERRALS:**

Classroom Referrals: Teachers may refer a student to the principal for classroom behavior that is impacting the student or others learning. Outdoor Referrals: Yard Duty Supervisors will refer students to the principal for outside behavior.

A student may be referred to the office immediately for any behavior that should result in a home suspension or expulsion. These behaviors include:

1. Caused, attempted to cause, or threatened to cause physical injury to another person.
2. Caught stealing or trying to steal.
3. Caught damaging or attempting to damage school or another's personal property.
4. Committing an obscene act or habitual profanity.
5. Willfully and habitually defying school authority.
6. In possession of a gun, knife, explosive, drugs, paraphernalia, or replicas of any of the listed items.
7. Sexual harassment.

## **Administrative Consequences**

When a student is referred to the office for a serious offense, parents will be notified. Consequences for office referrals include detention, loss of school privileges, suspension from school, parent conference, or other administrative action as deemed appropriate. Habitual misbehavior from any student may result in suspension and/or the implementation of a behavior contract between school and home.

**Loss of Privileges/Loss of Recess/Time Outs**

While serving a loss of recess, time out, or loss of privilege, students are expected to follow all directions from the supervising adult, sit quietly during the period or recess and complete any assignments without any assistance from others. Students who arrive late or are uncooperative will be asked to serve additional time as well as the remainder of the original assigned time.

A student may receive a "Time Out" in another classroom. The purpose of "Time Out" is to allow the student the opportunity to think about their behavior, and to think about ways to improve behavior before returning to the classroom.

## J. Active Shooter/Armed Assailants: Tactical Response

### PURPOSE:

This policy is intended to provide guidance in the event an individual is actively shooting persons at the school site and to comply with the applicable regulations of the Occupational Safety and Health Administration (OSHA).

### POLICY:

It is the policy of MARCUM-ILLINOIS to provide an active shooter emergency response plan to alert employees that an active shooter appears to be actively engaged in killing or attempting to kill people at the school site. Our active shooter response plan is based on giving employees authority to make crucial decisions that will save lives. School shootings typically end within just a few minutes before law enforcement arrives.

### DEFINITIONS:

For purposes of this policy: An **active shooter** is defined as a person or persons who appear to be actively engaged in killing or attempting to kill people on MARCUM-ILLINOIS's grounds. In most cases active shooters use firearm(s) and display no pattern or method for selection of their victims. In some cases, active shooters use other weapons and/or improvised explosive devices to cause additional victims and act as an impediment to police and emergency responders. These devices may detonate immediately, have delayed detonation fuses, or detonate on contact.

A **LOCKDOWN** may be a component of any emergency but is not an automatic response to an active shooter killing students and staff on campus. Instead, it is recommended you **RUN, HIDE, or FIGHT**.

### PROCEDURES

1. The first employee to identify an active shooter situation will **ALERT** others at the site. Use the loudest, most wide-ranging form of communication available. The Phone Intercom system will be utilized to alert there is an active shooter on campus.

-Speak in plain language, using the words **ACTIVE SHOOTER**.

-Location of the incident.

-Physical description of the shooter(s).

-Type of weapon (if known).

2. Any employee who is at a location distant and out of immediate threat from the active shooter will immediately call 911 to **INFORM** them of all details available.

3. The phone call to 911 (from the area where the caller is safely concealed) should provide the following information to the 911 operator:

a. Description of shooter(s) and possible location.

b. Number and types of weapons.

c. Shooter's direction of travel.

d. Location and condition of any victims.

### POTENTIAL RESPONSES

In response to an active shooter event there will be three potential courses of action. Employees are granted the authority to choose the course of action that they feel will result in the best outcome for them and their students.

**You can choose to RUN, HIDE, or if necessary, FIGHT.**



## ACTIVE SHOOTER EMERGENCY RESPONSE POLICY

### RUN

**If there is an accessible escape path, attempt to evacuate the premises, following these recommendations:**

1. Have an escape route and plan in mind that will get you and your students out of danger.
2. Assist children or others who cannot run to the best of your ability.
3. Leave your belongings behind.
4. If not in charge of students, evacuate regardless of whether others agree to follow.
5. Prevent others from entering an area where the active shooter may be.
6. Keep your hands visible.
7. Follow the instructions of any Police Officers/First Responders.
8. Do not attempt to move wounded people.
9. Call 911 when you are safe.
10. Go to the pre-arranged site(s) agreed upon for your site.

### HIDE

**If evacuation is not possible, find a secure place to hide where the active shooter is less likely to find you or be able to directly engage you. Follow these recommendations:**

#### **IF AN ACTIVE SHOOTER IS NEARBY**

1. Lock the door and barricade with all heavy furniture and equipment in the room.
2. Silence cell phones and keep students quiet. Dial 911 so the operator can listen to what is going on, even if you cannot talk.
3. Turn off any source of noise: Radios/TV/Learning devices.
4. USE COVER (anything that will protect you from bullets): Full bookcase, masonry wall, heavy desk, etc. and stay low.
5. USE CONCEALMENT (anything that will protect you from being seen): darkness, desks, chairs, doors. Stay away from doorways and windows that can be seen through.
6. Have a plan for an alternate means of escape if possible (through a window, adjoining room, etc.). Use your escape route as soon as you determine it will enhance your survivability. See RUN above.

#### **IF AN ACTIVE SHOOTER IS VERY CLOSE**

Lock the door if possible but do not make noise moving items in the room to barricade the door. Follow all the other recommendations above. Get ready to RUN or FIGHT if the shooter gains access.

### FIGHT

**If it is not possible to Run or Hide and you are confronted face-to-face with an active shooter then you may choose to distract or incapacitate the shooter long enough to increase survivability for yourself and your students. Follow these recommendations:**

1. Act as aggressively as possible against the shooter.
2. Yell, create confusion, and distract the shooter in any way possible.
3. Throw items at the shooter.
4. Use improvised weapons (spray with a fire extinguisher, hit with objects, trip, block or hit with chairs and desks).
5. Help others when possible if you see them attempting to incapacitate the shooter.
6. Ensure students are evacuating as rapidly as possible from the active engagement area.
7. Once started, commit yourself to the defensive physical actions.

## **ACTIVE SHOOTER EMERGENCY RESPONSE POLICY**

### **LAW ENFORCEMENT RESPONSE**

**Law enforcement personnel will arrive to respond to the emergency. Follow these recommendations:**

1. Comply with all police instructions. The first responding officers will be focused on stopping the active shooter and that is all. As others arrive, they will be clearing areas for follow-on emergency and medical teams.
2. Remain calm, do what you are told without arguing or second-guessing. If you have information about additional shooters or hazards inform them clearly.
3. Put down any items in your hands, raise your hands when coming in contact with officers.
4. Keep your hands visible at all times.
5. Avoid making quick movements toward officers. Do not try to hold on to them or get close to them for safety.
6. Avoid pointing, screaming, yelling.
7. If you find a weapon or have taken a weapon from an active shooter DO NOT carry it out in your hands. If safe, leave it where it is. If it is not safe to leave it where it is, then attempt to put it in a safe location, or bring out in a small container such as an office trash can. Put it down as soon as you see law enforcement and tell them what it is.
8. When evacuating, go the direction the officers are coming from. Do not ask for directions or help.

**When appropriate, be able to provide information that you know:**

1. Number of shooters.
2. Identity and description.
3. Number of victims you saw and location.
4. Type of problem that caused the situation.
5. Type and number of weapons possibly in the possession of the shooter.
6. Number and location of individuals still in the building or in danger.
7. Keys, codes, or access information to all areas.

### **POST-INCIDENT ACTION**

**When the police have determined that the active shooter emergency is under control, an "ALL CLEAR" will be given. You may not be allowed back into the school.**

- 1. Medical Assistance:**
  - a. Ensure first aid is applied as soon as possible, when in a safe area.
  - b. Treat severe bleeding and life-threatening wounds first.
  - c. Enlist all available help to prevent loss of blood, shock, and other trauma conditions.
  - d. Report all injuries to medical authorities on site as soon as possible.
  - e. For non-emergency employee injuries, contact Company Nurse 1-877-518-6702 for treatment instructions. In emergency medical situations, call the number as soon as you can following treatment to ensure your Workers Compensation Benefits are engaged.
- 2. Accountability:**
  - a. If in charge of students, attempt to gain accountability as soon as possible.
  - b. Communicate your status and the accountability of your students.

## **K. Bullying Prevention Policies & Procedures**

Marcum-Illinois Union Elementary School recognizes the harmful effects that discrimination, harassment, intimidation, and bullying have on student learning and school attendance, and works to provide a safe school environment that protects students from physical and emotional harm. No student or group of students shall, through physical, written, verbal, or other means, harass, sexually harass, threaten, intimidate, cyber bully, cause bodily injury to, or commit hate violence against any other student or school personnel. This includes acts of discrimination, harassment, intimidation, and bullying related to school activity.

### **The State of California defines bullying as:**

Bullying is unwanted, aggressive behavior among school aged children that involves a real or perceived power imbalance. The behavior is repeated, or has the potential to be repeated, over time. Both kids who are bullied and who bully others may have serious, lasting problems.

### **Prevention & Intervention**

School staff will receive annual training via Keenan Safe Schools which includes information about early warning signs of harassing/intimidating behaviors and effective prevention and intervention strategies.

Students are encouraged to notify school staff when they are being discriminated, harassed, intimidated, or bullied or suspect that another student is being victimized. In addition, the principal or designee will develop means for students to report threats or incidents confidentially and anonymously. School members who witness an act of discrimination, harassment, intimidation, and bullying shall take immediate steps to immediately intervene to stop the incident when it is safe to do so. As appropriate, the parents/guardians of victims and perpetrators will be notified. The principal or designee also may involve school counselors, mental health counselors, and/or law enforcement.

**References: Board Policy 5131.2**

# I. Working with the Media During a Crisis

## Tips on Working with the Media (Superintendent/designee)

- Consider the issue of the public's right to know and the media's right to access information within the context of professional, ethical, and moral behavior, and stand your ground firmly. Educate the media.
- Enlist media support to quiet rumors, to provide factual information, and to educate the public.
- KEEP THE MEDIA OFF THE SCHOOL CAMPUS.
- The Superintendent is to deal with the media.
- Schedule a press conference as soon as possible away from your school sites. Write and issue press releases.
- Appoint a person or committee to screen media coverage to keep current on what is being reported.
- Stress UNITY. Recognize the collective efforts of the group, rather than individuals.

## Checklist for Speaking with the Media (Superintendent/designee)

1. **Express Sympathy** - When a crisis has resulted in deaths or injuries begin by expressing your sympathy and concern for the victims and their families.
2. **Avoid Saying "No Comment"** - This suggests that you have something to hide. Instead say that you don't have enough information to comment and that you will get back to the reporter once you have it. Be sure you do.
3. **Avoid Speculation** - If you don't know something, admit it. Be careful not to speculate on the cause of the crisis, the extent of the damage or injury.
4. **Blame No One** - This speaks for itself!
5. **Be Straightforward When Answering Questions** - If you attempt to mislead a reporter, your deception will certainly surface. Your credibility will suffer.
6. **Consider Nothing "Off the Record" and Avoid Ad-Lib Comments** - If you don't want to be quoted on a particular subject, don't say anything about it.
7. **Emphasize the Positive** - If precautions were taken to avoid the crisis, point them out.
8. **Eliminate Negative Questions or Misleading Words** - If you include them in your response, they may be attributed to you.
9. **Correct Inaccuracies** - If incorrect information has appeared in the news media, be sure you point it out.
10. **Never Argue with a Reporter, Even When Provoked** - You will invariably end up "looking bad" in print, on camera, or on TV.

BEFORE THE GOVERNING BOARD OF  
MARCUM-ILLINOIS UNION SCHOOL DISTRICT  
SUTTER COUNTY, CALIFORNIA

In the Matter of the Reduction of )  
Classified School Services for the ) RESOLUTION: 2021-2022-6  
2022-2023 School Year )  
\_\_\_\_\_ )

WHEREAS, due to likely lack of funds and/or lack of work, the Governing Board of the Marcum-Illinois Union School District (“District”) hereby finds that it is in the best interest of the District to reduce or discontinue certain classified employee services now being provided for the upcoming year;

NOW, THEREFORE, BE IT RESOLVED that the following classified services and positions shall be eliminated:

Two (2) Instructional Aide/Paraprofessional Positions

BE IT FURTHER RESOLVED that the District Superintendent be authorized and directed to give notice of termination of employment to the affected employees pursuant to District rules and regulations and applicable provisions of law not later than March 15, 2022.

BE IT FURTHER RESOLVED that the District Superintendent be authorized and directed to take any other actions necessary to effectuate the intent of this Resolution.

THIS RESOLUTION was adopted at a meeting of the Governing Board of the Marcum-Illinois Union School District on February 14, 2022, by the following vote:

AYES: \_\_\_\_\_  
NOES: \_\_\_\_\_  
ABSTAIN: \_\_\_\_\_  
ABSENT: \_\_\_\_\_

\_\_\_\_\_  
Jeff Moore, President, Board of Trustees  
Marcum-Illinois Union School District

ATTEST:

\_\_\_\_\_  
Jill Bramhill, Clerk, Board of Trustees  
Marcum-Illinois Union School District

BEFORE THE GOVERNING BOARD OF  
MARCUM-ILLINOIS UNION SCHOOL DISTRICT  
SUTTER COUNTY, CALIFORNIA

In the Matter of the Reduction of Certificated )  
School Services for the 2022-2023 School Year ) RESOLUTION: 2021-2022-7  
\_\_\_\_\_ )

WHEREAS, the District has 10 certificated elementary positions employed to serve an enrollment of 182 students; and

WHEREAS, state and local funding for the School District is not likely to be sufficient to fund all certificated personnel; and

WHEREAS, if such positions are continued, the District will have a surplus of certificated personnel; and

WHEREAS, Section 44955 of the California Education Code permits a school district to reduce certificated staff when it becomes necessary to reduce a particular kind of service;

NOW, THEREFORE, BE IT RESOLVED,

1. The following full time equivalent positions will be eliminated effective July 1, 2022, for the 2022-2023 school year, as a result of the above reduction in services;

A. The services of two (2) elementary classroom teachers.

2. The District Superintendent be authorized and directed to give notice of termination of employment to the affected employees no later than March 15, 2022.

3. The District Superintendent is further authorized and directed to take any other action necessary to effectuate the intent of this Resolution.

THIS RESOLUTION was adopted at a regular meeting of the Governing Board of the Marcum-Illinois Union School District on February 14, 2022 by the following vote:

AYES: \_\_\_\_\_  
NOES: \_\_\_\_\_  
ABSTAIN: \_\_\_\_\_  
ABSENT: \_\_\_\_\_

\_\_\_\_\_  
Jeff Moore, President, Board of Trustees  
Marcum-Illinois Union School District

ATTEST:

\_\_\_\_\_  
Jill Bramhill, Clerk, Board of Trustees  
Marcum-Illinois Union School District