Tulare Public Cemetery District
Office: 900 E. Kern Ave, Tulare, CA 93274

Board of Trustees
Ryan Wilson, Chair ● Darla Rambonga, Vice Chair ●
Veisinia Tautuaa, Secretary ● Mary Mathias-Wiseman ● Heriberto Munoz

Notice of Regular Board Meeting & Agenda for Regular Board Meeting

Tuesday, October 27, 2026 ● 4 p.m.

Location: Cemetery District Office, 900 E. Kern Ave, Tulare, CA 93274

LIVE STREAM: View the live stream of the Board meeting online via Microsoft Teams: Click here to join the meeting. Meeting ID: 937 443 904 753 0; Passcode: 5R5eq3

PUBLIC COMMENTS (for items not listed on the agenda): Members of the public may comment on any item not appearing on the Agenda. Under state law, matters presented under this item cannot be discussed or acted upon by the Board at this time. So that all interested parties have an opportunity to speak, any person addressing the Board will be limited to a maximum of three (3) minutes, with a total of fifteen (15) minutes allotted for the Public Comment Period for items not listed on the agenda. Comments should be relevant to matters within the Board's subject matter jurisdiction and not repetitive of previous speakers. If you wish to agree with a previous speaker, you may state so on the record. If you have a written statement, please hand it to the Board Clerk/District Manager and it will be included in the minutes of this meeting and circulated to the Board. At all times, please state your name for the record.

PUBLIC COMMENTS (for items listed on the agenda): For items appearing on the Agenda, the public is invited to make comments during this time regarding the agenda items. The Board will take these comments into consideration. So that all interested parties have an opportunity to speak, any person addressing the Board will be limited to a maximum of three (3) minutes, with a total of fifteen (15) minutes allotted for the Public Comment Period for items listed on the agenda. Comments during this time should be relevant to agenda items and not repetitive of previous speakers. If you wish to agree with a previous speaker, you may state so on the record. If you have a written statement, please hand it to the Board Clerk/District Manager and it will be included in the minutes of this meeting and circulated to the Board. At all times, please state your name for the record.

ACCOMMODATIONS: In compliance with the Americans with Disabilities Act (ADA), if you need special assistance to participate in this meeting, please contact the District as soon as possible during office hours: (559) 686-5544 or email office@tularecemetery.net. Reasonable requests made at least 48 hours in advance of the meeting will ensure accessibility to this meeting.

BOARD AGENDA: Documents related to the items on this Agenda are available for public inspection in the Cemetery District Office, located at 900 E. Kern Avenue, Tulare, during normal business hours, 8 a.m. – 4 p.m., Monday through Friday. Such documents are also available online, subject to staff's ability to post the documents before the meeting, at the following website: https://www.tularecemetery.net/governance.

1. **Call to Order**
2. **Pledge of Allegiance**
3. **Roll Call**

4. **Public Comment for Items Not Listed on the Agenda –** Public comments are limited to three (3) minutes in compliance with the Brown Act for a total of 15 minutes.

5. **Public Comment for Items Listed on the Agenda –** Public comments are limited to three (3) minutes in compliance with the Brown Act for a total of 15 minutes.

6. **Minutes –** Approval of Minutes from September 22, 2026 Regular Board Meeting

7. **Financial Report –** Report on the September 2026 financials and Quickbooks Reconciliation Reports, and 1st Quarter Budget Report (Expenses & Revenue).

8. **Interment Counts Report –** Report on the September 2026 interment counts.

9. **District Manager Report –** Report on cemetery operations, grounds maintenance, project prioritization

10. **Budget Amendment Resolution for Fund 817 – Endowment Unreserved –** Board action.
    a. Budget Amendment Resolution to open expense lines for Fund 817 to specifically track usage of Endowment Fund interest.

11. **Transfer of 2025-2026 Fiscal Year Interest from Fund 773 – Endowment to Fund 817 – Endowment Unreserved** – Board action.

12. **Budget Line Revision for Fund 886 – Pre-Payment Plan** – Board action.

13. **Annual Review of Workplace Violence Prevention Plan, Illness & Injury Prevention Plan, Emergency Action Plan –** Annual review of policies updated in Fall 2025. Board action.

14. **Cemetery Event Ideas Discussion –** Heriberto Munoz, Board Member

15. **Board Member Comments/Discussion**

16. **Next Regular Meeting –** 4 p.m., Tuesday, November 24, 2026 at the Kern Cemetery, 900 E. Kern Ave, Tulare, CA 93274

17. **Adjourn**

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Board of Trustees
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Veisinia Tautuaa, Secretary ● Mary Mathias-Wiseman ● Heriberto Munoz

Board Minutes

Tuesday, September 22, 2026 ● 4 p.m.

Location: Cemetery District Office, 900 E. Kern Ave, Tulare, CA 93274

Call to Order – The meeting was called to order at 4 p.m. by Board Chair, Ryan Wilson. Vice Chair Darla Rambonga led the meeting participants in the flag salute.

Roll Call – Board members present: Mary Mathias-Wiseman, Darla Rambonga, Veisinia Tautuaa (arrived at 4:13 p.m.), Ryan Wilson and Heriberto Munoz. Also present: Trilby Barton, District Manager and various members of the public.

Public Comment – Public comment regarding non agenda items began at 4:02 p.m. with comments limited to three minutes per speaker. Public comments were provided by Xavier Avila and Mary Sepeda. Public comment regarding items listed on the agenda was closed at 4:09 p.m.

Public comment regarding items on the agenda began at 4:10 p.m. Comments were provided by Carlene Ringus, Xavier Avila, Linda Fry, Mary Sepeda, Shelby Fidler and Anna Limon. Public comment regarding items listed on the agenda was closed at 4:24 p.m.

Minutes – Mary Mathias-Wiseman made a motion to approve the minutes from the August 25, 2026 regular board meeting. Veisinia Tautuaa seconded. All board members voted in favor to approve the minutes.

Financial Reports – Ms. Barton provided the financial reports for August 2026, reporting on revenue and expenses for the 772 General Fund, and other accounts. Reconciliation reports were provided in the board packet for the 772, 773, 807, 817 and 886 accounts. She also provided an Expense Report to-date outlining vendors paid, amounts paid and description of the transaction in a spreadsheet format. Total expenses paid from the 772 General Fund account for the month of August was $93,827.58 Total revenue deposited into the 772 fund totaled $80,852.13. Notable expenses for August included $2,714.17 to Ewing Irrigation for the updating of valves to Bluetooth, the monthly GSRMA payment of $9,497.83 for insurance coverage, $9,167 for a standard order of vaults to Christy Vault Co., our monthly Plotbox charge of $1,350, and the monthly payment of $22,500 to Central Cal Landscaping & Maintenance. Expenses to date for September 2026 (as of 9/16/2026) was $58,029.66, not including payroll expenses. The CAL-Card credit card statement with receipts for all purchases was also included in the Board packet, and Ms. Barton provided a report to the Board on those purchases.

Interment Counts Report – Ms. Barton reported on the interments for August 2026. A total of 20 burials (15 full casket, 5 cremation) were held in August between both cemeteries. The total to date for burials for the fiscal year is 44 between both cemetery locations.

District Manager Report – Ms. Barton provided a report on the progress of the cemetery.

- **Cemetery Operations –** She reported she has been working on the migration of Quickbooks to the online version so we can roll that out on October 1 with the new price list. She's also been working on the ongoing daily tasks of payroll reviews and submission, employee management, review of invoices and submission of payment vouchers, and backing up Lydia and Phyllis as needed.

  She is also working on updating the contracts and taking out the superfluous information and updating the prices.

  Ms. Barton noted the GSRMA Risk Management Accreditation Program first deadline is coming up on November 13. She'll be working on revising the Purchasing Policy and hopes to have it available in October for the Board to review. She'll also be working to make sure the staff is up to date on their harassment trainings, and reminded Heriberto, Mary and Veisinia that they need to complete their SB 827 training, and extended their deadline to September 30. She noted the Injury/Illness Prevention Plan, Emergency Action Plan and Workplace Violence Prevention Plan will be included on the October board agenda for annual review.

- **Grounds Operations –** Ms. Barton reported the North crew has caught up on mowing and weedeating and is in maintenance mode now. Fixing of sprinklers is ongoing, and they cleaned up along the outside fence line, and have started cleaning and organizing the shop. They'll also be working on cleaning up the North equipment area.

  She reported she'll be scheduling the aerator rental for the North Cemetery and then the Kern Cemetery, and will be ordering seed and weed n feed to start the lawn nutrition for both cemeteries. She'll be coordinating the Kern maintenance with Central Cal Landscaping as per our contract, and the grounds crew will take care of the North Cemetery.

  She shared that our handyman is working on getting new tires for the canopy at the Kern and the canopy at the North. She also explained that pop-ups have been used at the North Cemetery for several years, as do many other cemeteries, and the old one broke, so we purchased a new one. It's used as a backup when the rolling canopy isn't functioning or when it won't fit into certain areas of the grounds due to trees or other obstacles.

  She also shared we have been receiving a number of compliments from families at both cemeteries regarding the noticeable progress we are making.

  She reported the Kern Cemetery Grounds crew's projects and priorities consist of burials (digs and services), cleaning and organizing both shops, cleaning the bull pen, working on the irrigation improvements, lifting and leveling sunken headstones and sunken graves, and helping the North crew with lawn maintenance as the burial schedule allows.

  The next step in equipment repairs is fixing the utility vehicles, but that hasn't been a priority focus yet. We're managing just fine. Both Grasshoppers are broken again and we won't be putting anymore money into them. We are working on an inventory

list and will be logging equipment that we could potentially sell. A lot of folks will buy tractors and mowers for parts.

The Board asked if Ms. Barton can talk to the Grounds crew about blowing off all headstones. Heriberto Munoz also asked about getting quotes to fix the utility vehicles. Mr. Munoz also asked about getting heaters to use during winter burials.

- **Upcoming Projects/Priorities –** Ms. Barton reported that a Winter/Fall project will be adding t-posts and chain along roadways where people are frequently driving on the grass and breaking sprinklers. Headstone repairs will also be started on in the Fall/Winter, but staff sorted through the piles of repair requests and organized them by cemetery and section. Ms. Barton will go through and make the official repair list. Block identification signs will also be going in.

  Ms. Barton also reported she'll be attending the GSRMA annual conference October 22-23 in Corning, California.

Headstone Policy – Ms. Barton explained that while on February 25, 2021, it was voted to give Barnes Memorial exclusive rights to set headstones, there is no official contract in place. She provided the Board with an updated draft Headstone Policy that would remove the verbal agreement giving exclusive rights to Barnes and give families the option to choose who they utilize to install their loved ones' headstones. She explained that families would be required to utilize a professional granite company and follow the installation specifications outlined in the updated Headstone Policy. Marker verification forms would also be required so the District can verify locations and other information before a headstone is placed. Board discussion was back and forth on the pros and cons of the updated policy. Ms. Tautuaa made a motion to table the discussion and decision of the Headstone Policy to a future meeting, and Ms. Rambonga seconded. Mr. Munoz, Ms. Mathias-Wiseman, Ms. Tautuaa and Ms. Rambonga voted to approve the tabling of the Headstone Policy. Mr. Wilson opposed.

Witnessing of Lowering Policy – Ms. Barton provided a draft of the Witnessing of the Lowering Policy, and shared the policy will allow families the option to witness their loved one being lowered. There are safety parameters built into the policy, and the District will work with the mortuaries to inform them of the new policy. Ms. Tautuaa made a motion to approve the Witnessing of the Lowering Policy, and Ms. Rambonga seconded. All Board members voted to approve the new policy.

Dead Tree Removal at Kern Cemetery – The Board discussed the removal of the three dead trees and large stumps at the Kern Cemetery. They directed Ms. Barton to go ahead and get three quotes for the tree removal, and we will revisit it during the January Board meeting.

Board Member Comments/Discussion

- Ms. Rambonga addressed social media statements that have been made on various pages that have been false, and she corrected those comments, requested that false comments stop. Ms. Rambonga also rejected the Board stipend, and will provide that in writing. She also noted that she visits many cemeteries as part of the Honor Guard, and that a lot of cemeteries use pop-ups.

- Ms. Mathias-Wiseman thanked Ms. Rambonga for sharing her thoughts, and she too will put into writing that she is going to reject her stipend. She also made some comments regarding social media.
- Ms. Tautuaa thanked Ms. Barton for the plan on the website updates and Quickbooks and wants to make sure we're auditing the equipment list as we keep moving forward on our plan to make things better. She also thanked the community for bringing thoughts and feedback to the meetings.
- Mr. Munoz asked if there are any ideas for events for the next few months, considering Dia de los Muertos and others are coming up. Ms. Barton said she can put it on the agenda for the October meeting and Mr. Munoz can share his ideas.

Next Regular Meeting – The next board meeting will be held at 4 p.m., Tuesday, October 27, 2026 at the Kern Cemetery, 900 E. Kern Ave, Tulare, CA 93274.

Adjourn – Ms. Rambonga made a motion to adjourn the meeting, and Ms. Tautuaa seconded. Mr. Wilson adjourned the meeting at 5:58 p.m.

Signed: _____
Veisinia Tautuaa, Board Secretary

Expense Budget - 2026/2027 Fiscal Year - 1st Quarter Report

Budget Category	Description	2025-26 FY Budgeted	2025-26 FY Actual	Remaining Balance	2026-27 FY Budgeted	2026-27 FY Actual	Remaining Balance	Notes
6001	Allocated Salary	$ 535,823.00	$ 485,564.99	$ 50,258.01	$ 495,000.00	$ 97,576.98	$ 397,423.02	Regular pay for seven groundskeepers, two office staff, part-time district manager with cushion room for annual performance raises. Includes 3 percent Cost of Living Adjustment for each staff member and annual performance raises
6002	Overtime	$ 20,000.00	$ 11,907.30	$ 8,092.70	$ 20,000.00	$ 8,002.13	$ 11,997.87	
6004	Benefits	$ 97,201.00	$ 84,329.72	$ 12,871.28	$ 110,000.00	$ 20,835.12	$ 89,164.88	Health insurance benefits for employees
6003	Other Pay	$ 18,550.00	$ 1,744.04	$ 16,805.96	$ -	$ -	$ -	Not sure what this line item was used for in the past, but eliminating from the budget.
6005	Extra Help	$ 80,000.00	$ 65,211.34	$ 14,788.66	$ 10,000.00	$ 46.68	$ 9,953.32	Cushion in case we need to bring in some temporary staff in case of an emergency
6011	Retirement - SD Portion	$ 40,050.00	$ 40,529.78	$ (479.78)	$ 50,000.00	$ 8,357.79	$ 41,642.21	District contribution to CALPERS retirement, cushion room in case new law is passed that increases required costs
6012	Social Security/Medicare	$ 42,453.00	$ 39,024.79	$ 3,428.21	$ 50,000.00	$ 7,849.79	$ 42,150.21	Employer's portion of Social Security/Medicare contributions
6015	Workers Compensation	$ 36,698.00	$ 38,229.03	$ (1,531.03)	$ 43,715.00	$ 10,927.74	$ 32,787.26	$3,642.58 per month for Worker's Comp coverage - GSRMA
7001	Agricultural	$ -		$ -	$ 20,000.00	$ -	$ 20,000.00	Weed N Feed and grass seed for overseeding and lawn nutrition (twice per year)
7003	Tax Admin Fees	$ 2,000.00	$ 5,196.00	$ (3,196.00)	$ 7,200.00	$ -	$ 7,200.00	Estimated $1,800 per quarter
7004	Clothing and Personal Supplies	$ 1,600.00	$ 1,583.16	$ 16.84	$ 2,000.00	$ 35.09	$ 1,964.91	Seven pairs of boots allotted for grounds staff at $150 each ($1,050), cushion for new uniform shirts
7005	Communications	$ 11,500.00	$ 11,614.69	$ (114.69)	$ 6,500.00	$ 1,693.94	$ 4,806.06	Telephone service - new VOIP system ($136.23 per month); estimated $250 per month for internet service at Kern and North; $1,062.83 for new telephones and headsets; cushion room
7006	Cost of Supplies Reissued	$ 131,000.00	$ 122,693.09	$ 8,306.91	$ 125,000.00	$ 17,361.00	$ 107,639.00	Vault orders (154 standard) and specialized (Monticello, 27 FB, 20 cremation); cremation vaults (54 standard), plus cushion room
7009	Household Expense	$ 1,989.00	$ 1,835.26	$ 153.74	$ 6,000.00	$ 466.12	$ 5,533.88	Pallets of water for employee heat prevention; CINTAS First Aid Supply replenishing; ULINE bathroom supplies; etc.
7010	Insurance	$ 55,798.00	$ 59,021.64	$ (3,223.64)	$ 70,265.00	$ 17,565.75	$ 52,699.25	$5,855.25 per month for General Liability coverage - GSRMA
7012	Director's Fees	$ 1,688.00	$ -	$ 1,688.00	$ -	$ -	$ -	
7021	Maintenance - Equipment	$ 78,189.00	$ 84,120.61	$ (5,931.61)	$ 70,000.00	$ 16,057.27	$ 53,942.73	Servicing of equipment, tire repairs, update remainder of irrigation valves for Kern Cemetery ($5,000); ongoing irrigation repair parts, grounds maintenance supplies, etc.
7024	Maintenance - Building	$ 24,300.00	$ 24,851.50	$ (551.50)	$ 24,000.00	$ 751.63	$ 23,248.37	Building and shop repairs as needed, AC/Heater servicing, plumbing issues, monthly pest control services ($100 per month)
7027	Memberships	$ 515.00	$ 5,242.80	$ (4,727.80)	$ 5,500.00	$ -	$ 5,500.00	Membership to Public Cemetery Alliance and California Special District Association
7036	Office Expense	$ 34,390.00	$ 24,408.62	$ 9,981.38	$ 30,000.00	$ 3,584.49	$ 26,415.51	Printer rentals (or purchase of new printers), website maintenance and hosting (switch from Streamline to cost-effective WordPress), monthly IT support fee; email service fee; Quickbooks Online; office supplies
7043	Professional/Specialty Services	$ 159,358.00	$ 136,017.74	$ 23,340.26	$ 145,000.00	$ 9,546.08	$ 135,453.92	External audit; gopher abatement for both cemeteries ($10,500); Barnes Memorial installations; frame supplies/cement for headstone repairs; new timer box/upgraded valves at North Cemetery; another set of metal shores for grave stabilization and chains to move them, and other improvement/handyman projects for Reed Shaffer; etc.
7046	Attorney Fees	$ 35,000.00	$ 38,992.03	$ (3,992.03)	$ 10,000.00	$ 2,813.80	$ 7,186.20	County Counsel support, reviews as necessary and attendance at board meetings when requested
7056	Tree Maintenance	$ -	$ -	$ -	$ 25,000.00	$ -	$ 25,000.00	$7,500 for removal of two pines and grind stump at Kern Cemetery; cushion for other necessary trims and/or removals
7059	Publications and Legal Notices	$ 2,000.00	$ -	$ 2,000.00	$ -	$ -	$ -	None anticipated
7066	District Special Expense	$ 21,915.00	$ 34,959.96	$ (13,044.96)	$ 270,000.00	$ 45,000.00	$ 225,000.00	Lawn maintenance for Kern Cemetery
7073	Training	$ 4,000.00	$ -	$ 4,000.00	$ 2,000.00	$ -	$ 2,000.00	Will likely take advantage of free trainings and webinars available through Vector Solutions and CSDA for the fiscal year to save money; but budget just in case
7074	Transportation and Travel	$ 4,325.00	$ 1,026.44	$ 3,298.56	$ 3,000.00	$ 257.61	$ 2,742.39	Mileage reimbursement for staff/board travel to run errands, attend trainings, and travel between North and Kern cemeteries
7081	Utilities	$ 83,567.00	$ 76,498.97	$ 7,068.03	$ 80,000.00	$ 16,671.74	$ 63,328.26	Electricity ($30,000), roll-offs/trash service ($11,000), gas ($1,500), water/sewer ($40,000); cushion for unexpected
7106	Gas and Oil	$ 9,295.00	$ 8,959.44	$ 335.56	$ 10,000.00	$ 1,186.59	$ 8,813.41	Increased budget amount due to higher fuel costs, but anticipate way less usage of gas with Kern lawn maintenance outsourced
9100	Transfer-out	$ 200,000.00	$ 200,000.00	$ -	$ -	$ -	$ -	Not needed for this fiscal year, as line item was opened for 2025-26 FY one-time transfer
7040	Bank Fees	$ 600.00	$ -	$ 600.00	$ -	$ -	$ -	This line item not needed now that Bank of Sierra account is closed.
7425	Taxes and Assessments	$ 8,000.00	$ 13,442.61	$ (5,442.61)	$ -	$ -	$ -	Should technically be line in and line out for 2535 - Sales Tax; doesn't need to be in the budget
8001	Repurchase of Grave Site	$ 8,500.00	$ 8,500.00	$ -	$ -	$ -	$ -	Recommend not reinstating grave re-purchase policy until 2027-28 Fiscal Year after we've sorted through 886 account
8100	Building and Improvements	$ -	$ -	$ -	$ 10,000.00	$ -	$ 10,000.00	Cushion room for any repairs we may need to make to the physical buildings or fences due to vandalism or theft. Not anticipating any other building-related projects for 26-27 FY
8300	New Equipment	$ -	$ -	$ -	$ 15,000.00	$ -	$ 15,000.00	Cushion room in case we have an emergency and need to buy a new piece of equipment
	Totals:	**$ 1,750,304.00**	**$ 1,625,505.55**	**$ 124,798.45**	**$ 1,715,180.00**	**$ 286,587.34**	**$ 1,428,592.66**	

Note: Just because a budget line is open, doesn't mean the District spends the money on that line.

Revenue Budget - 2026-2027 Fiscal Year - 1st Quarter Report

Budget Category	Description	2025-26 FY Budgeted	2025-26 FY Actual	Remaining Balance	2026-27 FY Budgeted	2026-27 FY Actual	Remaining Balance	Notes
4001	Property Taxes - Current Secured	$ 213,800.00	$ 212,994.31	$ 805.69	$ 210,000.00	$ -	$ 210,000.00	
4006	Propety Taxes - Current Unsecured	$ 15,000.00	$ 16,555.82	$ (1,555.82)	$ 15,000.00	$ -	$ 15,000.00	
4008	Property Taxes - Prior Secured	$ 4,000.00	$ 4,893.93	$ (893.93)	$ 4,000.00	$ -	$ 4,000.00	
4009	Property Taxes - Prio Unsecured	$ 200.00	$ 243.56	$ (43.56)	$ 200.00	$ -	$ 200.00	
4030	Supplemental Property Taxes - Current Secured	$ 5,000.00	$ 5,772.96	$ (772.96)	$ 5,000.00	$ -	$ 5,000.00	
4033	Supplemental Property Taxes - Prior	$ 1,000.00	$ 1,773.25	$ (773.25)	$ 1,250.00	$ -	$ 1,250.00	
4060	Residual Dist	$ 16,000.00	$ 13,468.00	$ 2,532.00	$ 13,000.00	$ -	$ 13,000.00	
4069	PT Facilities	$ 10,000.00	$ 10,883.00	$ (883.00)	$ 10,000.00	$ -	$ 10,000.00	
4801	Interest (in PPP)	$ 4,348.00	$ 8,057.61	$ (3,709.61)	$ 6,000.00	$ 2,138.28	$ 3,861.72	
5000	I/G Revenues	$ -	$ 31.40	$ (31.40)	$ 20.00	$ -	$ 20.00	
5050	State Homeowners Property Tax Relief	$ 100.00	$ 1,152.32	$ (1,052.32)	$ 500.00	$ -	$ 500.00	
5400	Current Services	$ -	$ 72,609.91	$ (72,609.91)	$ 10,000.00	$ 13,000.00	$ (3,000.00)	Close this line after September when new price list rolls out. Concrete bases sales for July-September that is earmarked for Barnes. In and out line, not actual profit.
5805	Miscellaneous Revenues	$ 8,000.00	$ 205.10	$ 7,794.90	$ 38,000.00	$ -	$ 38,000.00	Saturday Services, After-Hours Services, Transfer Fees, Non-Resident Fees, Niche Vases, etc.
5835	Other Revenue	$ 2,500.00	$ 66,678.32	$ (64,178.32)	$ 155,950.00	$ 1,385.06	$ 154,564.94	Headstone Coordination Fees & Admin Fees
5835	*Headstone Coordination Fees*	*$ -*	*$ -*	*$ -*	*$ 36,750.00*	*$ -*	*$ 36,750.00*	*Headstone Coordination Fees based on estimate of 147 single or 1st of double burial*
5835	*Admin Fees*	*$ -*	*$ -*	*$ -*	*$ 119,200.00*	*$ -*	*$ 119,200.00*	*Admin Fee based on estimate of 298 burials*
5816	Other Sales - Taxable	$ 150,000.00	$ 136,356.95	$ 13,643.05	$ 189,600.00	$ 38,156.00	$ 151,444.00	Vault Sales: Estimated 154 FB standard, 54 cremation standard, 21 FB protective, 20 cremation protective
5542	Burial Fees	$ 854,380.00	$ 702,728.35	$ 151,651.65	$ 679,190.00	$ 183,985.61	$ 495,204.39	Plot Sales and Opening/Closing
5542	*Pre-Need Plots*			*$ -*	*$ -*	*$ -*	$ -	*Pre-need plot sales (2026-2027 numbers not configured yet. Will track this fiscal year to determine trend for 2027-2028 FY)*
5542	*Plot Sales*			*$ -*	*$ 313,384.00*	*$ -*	*$ 313,384.00*	*Plot sales (160 total between single, double, cremation, baby at both cemeteries)*
5542	*Burial Services*			*$ -*	*$ 365,806.00*	*$ -*	*$ 365,806.00*	*Opening & closing fees (193 FB; 88 cremation, 17 niches)*
9200	Operating Transfer-In	$ 328,711.00	$ 328,711.41	$ (0.41)	$ 171,186.50	$ -	$ 171,186.50	$82,944 transfer in from Fund 817 Endowment Unreserved (consider closing this account mid-FY); $88,242.50 from 773 Endowment Care (annual interest from 2025-2026 FY)
	Totals for 785 Account Income:	**$ 1,613,039.00**	**$ 1,583,116.20**	**$ 29,922.80**	**$ 1,508,896.50**	**$ 238,664.95**	**$ 1,270,231.55**	

*Revised income based on updated/approved prices. Projected income was originally $1,678,556.50.

Tulare Public Cemetery District Financials: Expense Report for October 2026 Board Meeting

Final Expense Report: September 2026

Transaction #	Vendor/Payee	Budget Line Item	Invoice Amount	Submitted to County for Payment	Notes
15511	Rescom Pest Control	7024	$ 50.00	9/2/2026	Invoice# 295803749
15512	LEAF	7036	$ 411.97	9/2/2026	Invoice# 20788172 - Printer rental
15513	Central Cal Landscaping & Maintenance	7066	$ 22,500.00	9/2/2026	Invoice# 422, August 2026
15514	Reed Shaffer	7021	$ 135.00	9/2/2026	Invoice# 011-26 - Repairs to dirt trailer tail
15514	Reed Shaffer	7021	$ 210.14	9/2/2026	Invoice# 012-26 - Repair to tow bar on lowering device trailer
15515	Mineral King Publishing Inc.	7036	$ 626.18	9/2/2026	Invoice# 74610 - Public hearing notice in The Sun Gazette
15516	Ewing Irrigation Products	7021	$ 715.94	9/2/2026	Invoice# 31587277 & 31626903 - Irrigation repair parts
15517	GSRMA	7010	$ 5,855.25	9/2/2026	October 2026 Coverage - General Liability Insurance
15517	GSRMA	6015	$ 3,642.58	9/2/2026	October 2026 Coverage - Worker's Comp Insurance
15518	WM Corporate Services	7081	$ 804.94	9/2/2026	July and August 2026 Trash Service for North
15519	California Business Machines	7036	$ 271.67	9/2/2026	Invoice# 637780 & 635103
15520	City of Tulare	7081	$ 3,403.78	9/2/2026	Water & Trash service for Kern
15521	Lydia Cervantes	7074	$ 52.41	9/2/2026	July/August 2026 Mileage Reimbursement
15522	Linder Equipment Company	7021	$ 1,260.70	9/2/2026	Invoice# SA27180 - Service of Kubota M62
15522	Linder Equipment Company	7021	$ 855.19	9/2/2026	Invoice# SA27181 - Service of Kubota
15522	Linder Equipment Company	7021	$ 1,117.99	9/2/2026	Invoice# SA27182 - Service of Kubota M6060 HD
15522	Linder Equipment Company	7021	$ 690.31	9/2/2026	Invoice# SA27183 - Kubota L2501 DT
15522	Linder Equipment Company	7021	$ 733.95	9/2/2026	Invoice# SA27184 - Kubota L2501 HST
15523	Christy Vault Co.	7006	$ 2,490.00	9/2/2026	Invoice#s 0103677-IN, 0103634-IN, 0103635-IN
15524	Southern California Edison	7081	$ 2,873.82	9/8/2026	Electric bill for both locations
15525	Pinnacle Technology	7036	$ 200.00	9/8/2026	Invoice# 10166 - September 2026 Retainer services
15526	Cal-Card (US Bank) Credit Card	7036	$ 173.72	9/8/2026	Credit card payment - Amazon (envelopes, binder clips, timecards), Quickbooks Monthly Subscription, USPS for postage
15526	Cal-Card (US Bank) Credit Card	7021	$ 147.56	9/8/2026	Credit card payment - Walmart (canopy for service shade)
JV	County of Tulare Health Benefits Unit	6004	$ 6,088.88	9/8/2026	September 2026 coverage for Health Benefits
15527	Morris Levin & Son	7043	$ 313.58	9/16/2026	Invoice# 2609-167163 - Repair of broken water line
15527	Morris Levin & Son	7021	$ 20.53	9/16/2026	Invoice#s 2608-158539 & 2608-161288 - Grounds supplies
15528	Eddy Torrez	7074	$ 8.64	9/16/2026	Mileage Reimbursement - August 2026

Tulare Public Cemetery District Financials: Expense Report for October 2026 Board Meeting

Transaction #	Vendor/Payee	Budget Line Item	Invoice Amount	Submitted to County for Payment	Notes
15529	California Business Machines	7036	$ 19.00	9/16/2026	Invoice# 642192 - Black toner for 4054 printer
15530	Battery Pro	7021	$ 136.23	9/16/2026	Invoice# 40585 - New battery for Exmark mower at North
15531	AT&T	7005	$ 366.71	9/16/2026	Account# 831-001-5048 844
15532	AT&T	7005	$ 9.60	9/16/2026	Account# 254262976
15533	AT&T Mobility	7005	$ 25.25	9/16/2026	Account# 287305031960
15534	Reed Shaffer	7021	$ 146.30	9/16/2026	Invoice# 013-26 - Chains for grave shorings
15535	Ewing Irrigation Products	7021	$ 192.84	9/16/2026	Invoice# 31722409 - Irrigation repair parts
JV	Tulare County Counsel	7046	$ 1,479.00	9/16/2026	Invoice# TCD_0726 - July attorney services
15536	ULINE	7009	$ 364.61	9/23/2026	Invoice# 213141190 - Toilet paper and paper towels for both cemeteries
15537	Cal Turf Equipment & Supply	7021	$ 19.76	9/23/2026	Invoice# 730652 - Weedeater string
15537	Cal Turf Equipment & Supply	7021	$ 414.80	9/23/2026	Invoice# 731183 - New tire for lawnmower
15538	SoCalGas	7081	$ 33.08	9/23/2026	Monthly gas bill - Kern (September 2026)
15538	SoCalGas	7081	$ 29.68	9/23/2026	Monthly gas bill - Kern (August 2026)
15539	Cintas First Aid Safety	7009	$ 50.99	9/23/2026	Invoice#s 5342664006, 5359133402, 5356970101
15540	Jeremy Rumsey	7074	$ 96.48	9/30/2026	Mileage Reimbursement - August 24, 2026-September 28, 2026
15541	WM Corporate Services	7081	$ 412.53	9/30/2026	Trash service - August & September
15542	Plotbox, Inc.	7043	$ 1,350.00	9/30/2026	Invoice# INV7359
15543	Roche Oil, Inc.	7106	$ 1,020.04	9/30/2026	Invoice# 76639 - North Cemetery diesel fuel
15543	Roche Oil, Inc.	7106	$ 612.02	9/30/2026	Invoice# 76638 - Kern Cemetery diesel fuel
15544	Central Cal Landscaping & Maintenance	7066	$ 22,500.00	9/30/2026	Invoice# 440 - September 2026
15545	Hilvers Farm Management	7043	$ 975.00	9/30/2026	Invoice# 1581 - Gopher abatement North Cemetery
15545	Hilvers Farm Management	7043	$ 2,405.00	9/30/2026	Invoice# 1582 - Gopher abatement Kern Cemetery
15545	Hilvers Farm Management	7043	$ 1,427.34	9/30/2026	Invoice# 1533 - Gopher abatement North Cemetery (May 2026) - Invoice buried in emails
15546	LEAF	7036	$ 411.97	9/30/2026	Kyocera Copier/Printers monthly fee
15547	California Business Machines	7036	$ 218.77	9/30/2026	Invoice# 645429 - Printing charges (Kern)
15547	California Business Machines	7036	$ 59.07	9/30/2026	Invoice# 647934 - Printing charges (North)
15548	Ewing Irrigation Products	7021	$ 177.46	9/30/2026	Invoice#s 31944075 & 31938283, Irrigation repair supplies
15549	Cintas First Aid Safety	7009	$ 22.72	9/30/2026	Invoice# 5362075508
15550	Cal Turf Equipment & Supply	7021	$ 187.25	9/30/2026	Invoice# 732244 - 2 spools of trimmer line
15551	Morris Levin & Son	7021	$ 111.03	9/30/2026	Invoice# 2609-169309, Rodent bait blocks for North shop

Tulare Public Cemetery District Financials: Expense Report for October 2026 Board Meeting

Transaction #	Vendor/Payee	Budget Line Item	Invoice Amount	Submitted to County for Payment	Notes
JV	Tulare County Counsel	7046	$ 1,414.30	9/30/2026	Invoice# TCD_0826, August legal services

Total Operating Expenses for Sept. 2026 (to date): $ 92,343.56 *(not including payroll expenses, see Reconciliation Report for Fund 772)*

Expense Report To-Date: October 2026 (through 10/21/2026)

Transaction #	Vendor/Payee	Budget Line Item	Invoice Amount	Submitted to County for Payment	Notes
15552	Barnes Memorials	7043	$ 6,400.00	10/13/2026	Invoice# 6824 - 16 headstone installations
15553	Christy Vault Co.	7006	$ 1,037.00	10/13/2026	Invoice# 0103845-IN - Monticello Mata
15554	Roche Oil, Inc.	7106	$ 291.59	10/13/2026	Invoice# 204769 - Gas for North Cemetery
15555	Southern California Edison	7081	$ 2,555.67	10/13/2026	Electric bill for both locations
15556	GSRMA	7010	$ 5,855.25	10/13/2026	General Liability Insurance - November 2026 Coverage
15556	GSRMA	6015	$ 3,642.58	10/13/2026	Worker's Comp Insurance - November 2026 coverage
15557	City of Tulare	7081	$ 4,190.56	10/13/2026	Water and trash service for Kern Cemetery
15558	Pinnacle Technology	7036	$ 200.00	10/13/2026	Invoice# 10201 - Monthly IT retainer services
15559	ResCom Pest Control	7024	$ 100.00	10/13/2026	Invoice# 295803082 & 297279235, pest control both cemeteries
15560	AT&T Mobility	7005	$ 25.63	10/13/2026	Monthly telephone service
15561	AT&T	7005	$ 95.19	10/13/2026	Monthly internet service - Kern
15562	Cintas First Aid Safety	7009	$ 46.30	10/13/2026	Invoice# 5365521814
15563	Cal-Card (US Bank) Credit Card	7036	$ 334.75	10/13/2026	Quickbooks monthly subscription, USPS postage, O'Reilly Auto Parts (Ford pickup
JV	County of Tulare Health Benefits Unit	6004	$ 6,088.88	10/13/2026	October 2026 coverage for Health Benefits
15564	California Dept. of Tax & Fee Administration	2535	$ 3,128.00	10/21/2026	July-September 2026 Quarterly Sales Tax
15565	SoCalGas	7081	$ 28.77	10/21/2026	Monthly gas service
15566	Southern Tire Mart	7021	$ 737.93	10/21/2026	New tires on flatbed trailer, Invoice# 7200054102
15567	Triple Crown Fence Co, Inc.	7024	$ 3,720.00	10/21/2026	Invoice# 2777 - Fence repair along Blackstone from traffic accident
15568	Christy Vault Co.	7006	$ 1,403.00	10/21/2026	Invoice# 0103925-IN & 0103926-IN
15569	Reed Shaffer	7021	$ 208.79	10/21/2026	Invoice# 014-26 - Flat tire repair on Kern canopy
15570	AT&T	7005	$ 372.24	10/21/2026	Telephone/internet for North J Street
15571	Roche Oil, Inc.	7106	$ 518.33	10/21/2026	Invoice# 77063 - New hose and pump on North diesel tank; Invoice# 205089 - Fuel for District truck
15572	Morris Levin & Son	7043	$ 612.96	10/21/2026	Invoice# 2610-174896 - Water line repair at Kern Cemetery

Tulare Public Cemetery District Financials: Expense Report for October 2026 Board Meeting

Transaction #	Vendor/Payee	Budget Line Item	Invoice Amount	Submitted to County for Payment	Notes
15572	Morris Levin & Son	7009	$ 544.67	10/21/2026	Invoice# 2610-176636 - Pallet of water for employees
15572	Morris Levin & Son	7021	$ 22.91	10/21/2026	Invoice# 2610-176540 - Grounds supplies
15573	California Business Machines	7036	$ 217.33	10/21/2026	Invoice# 655885 - Kern Cemetery office printing

Total Expenses for October 2026 (to date): $ 42,378.33 *(not including payroll expenses)*

Tulare Public Cemetery District
Reconciliation Summary
10500 · Cash in Treasury (772), Period Ending 09/30/2026

	Sep 30, 26	
Beginning Balance		219,959.63
Cleared Transactions		
Checks and Payments - 46 items	-128,334.64	
Deposits and Credits - 7 items	63,693.06	
Total Cleared Transactions	-64,641.58	
Cleared Balance		**155,318.05**
Uncleared Transactions		
Checks and Payments - 23 items	-35,315.49	
Deposits and Credits - 2 items	17,975.70	
Total Uncleared Transactions	-17,339.79	
Register Balance as of 09/30/2026		**137,978.26**
New Transactions		
Checks and Payments - 13 items	-30,863.40	
Deposits and Credits - 1 item	22,591.30	
Total New Transactions	-8,272.10	
Ending Balance		**129,706.16**

Tulare Public Cemetery District
Reconciliation Detail
10500 · Cash in Treasury (772), Period Ending 09/30/2026

Type	Date	Num	Name	Clr	Amount	Balance
Beginning Balance						219,959.63
Cleared Transactions						
Checks and Payments - 46 items						
Check	08/12/2026	15493	Central Cal Landsca...	X	-22,500.00	-22,500.00
Check	08/12/2026	15495	AT&T	X	-255.78	-22,755.78
Check	08/19/2026	15499	Barnes Memorials	X	-4,800.00	-27,555.78
Check	08/19/2026	15504	US Bank - CAL Card	X	-951.26	-28,507.04
Check	08/19/2026	15497	AT&T	X	-366.39	-28,873.43
Check	08/19/2026	15502	Res Com Pest Control	X	-100.00	-28,973.43
Check	08/19/2026	15505	Rumsey, Jeremy	X	-95.76	-29,069.19
Check	08/19/2026	15500	CAL Turf Equipment...	X	-74.37	-29,143.56
Check	08/19/2026	15498	Morris Levin & Son	X	-19.46	-29,163.02
Check	08/26/2026	15510	PLOTBOX INC	X	-1,350.00	-30,513.02
Check	08/26/2026	15508	Christy Vault Co, Inc.	X	-1,037.00	-31,550.02
Check	08/26/2026	15507	Reed Shaffer	X	-604.28	-32,154.30
Check	08/26/2026	15506	Pinnacle Technology	X	-200.00	-32,354.30
Check	08/26/2026	15509	Cintas First Aid Safety	X	-41.87	-32,396.17
Check	09/02/2026	15513	Central Cal Landsca...	X	-22,500.00	-54,896.17
Check	09/02/2026	15517	Golden State Risk M...	X	-9,497.83	-64,394.00
Check	09/02/2026	15522	Linder Equip CO.	X	-4,658.14	-69,052.14
Check	09/02/2026	15520	City of Tulare	X	-3,403.78	-72,455.92
Check	09/02/2026	EFT	CALPERS	X	-2,304.34	-74,760.26
Check	09/02/2026	15518	WM Corporate Servi...	X	-804.94	-75,565.20
Check	09/02/2026	15516	Ewing Irrigation Pro...	X	-715.94	-76,281.14
Check	09/02/2026	15515	Mineral King Publish...	X	-626.18	-76,907.32
Check	09/02/2026	15512	Leaf	X	-411.97	-77,319.29
Check	09/02/2026	15514	Reed Shaffer	X	-345.14	-77,664.43
Check	09/02/2026	15519	California Business ...	X	-271.67	-77,936.10
Check	09/02/2026	15521	Lydia Cervantes	X	-52.41	-77,988.51
Check	09/02/2026	15511	Res Com Pest Control	X	-50.00	-78,038.51
Check	09/08/2026	JV	Health Benefits Unit	X	-6,088.88	-84,127.39
Check	09/08/2026	15524	Southern California ...	X	-2,873.82	-87,001.21
Check	09/08/2026	15523	Christy Vault Co, Inc.	X	-2,490.00	-89,491.21
Check	09/08/2026	15526	US Bank - CAL Card	X	-321.28	-89,812.49
Check	09/08/2026	15525	Pinnacle Technology	X	-200.00	-90,012.49
Check	09/10/2026	JV	Payroll	X	-14,033.71	-104,046.20
Check	09/11/2026	JV	FIT-FICA Tax Deposit	X	-3,433.53	-107,479.73
Check	09/11/2026	JV	State Tax Deposit	X	-557.53	-108,037.26
Check	09/14/2026	JV	California State Disb...	X	-134.00	-108,171.26
Check	09/16/2026	EFT	CALPERS	X	-2,342.01	-110,513.27
Check	09/16/2026	JV	Tulare County Coun...	X	-1,479.00	-111,992.27
Check	09/16/2026	15535	Ewing Irrigation Pro...	X	-192.84	-112,185.11
Check	09/16/2026	15533	AT & T Mobility	X	-25.25	-112,210.36
Check	09/16/2026	15529	California Business ...	X	-19.00	-112,229.36
Check	09/25/2026	JV	Payroll	X	-12,206.69	-124,436.05
Check	09/28/2026	JV	FIT-FICA Tax Deposit	X	-2,955.54	-127,391.59
Check	09/28/2026	JV	State Tax Deposit	X	-517.55	-127,909.14
Check	09/29/2026	JV	County of Tulare	X	-262.50	-128,171.64
Check	09/29/2026	JV	California State Disb...	X	-163.00	-128,334.64
Total Checks and Payments					-128,334.64	-128,334.64
Deposits and Credits - 7 items						
Deposit	09/04/2026			X	9,937.50	9,937.50
Deposit	09/09/2026			X	49.50	9,987.00
Deposit	09/11/2026			X	25,906.43	35,893.43
Deposit	09/18/2026			X	10,000.00	45,893.43
Deposit	09/25/2026			X	1,814.15	47,707.58

Tulare Public Cemetery District
Reconciliation Detail
10500 · Cash in Treasury (772), Period Ending 09/30/2026

Type	Date	Num	Name	Clr	Amount	Balance
Deposit	09/25/2026			X	13,847.20	61,554.78
Deposit	09/30/2026			X	2,138.28	63,693.06
Total Deposits and Credits					63,693.06	63,693.06
Total Cleared Transactions					-64,641.58	-64,641.58
Cleared Balance					-64,641.58	155,318.05
Uncleared Transactions						
Checks and Payments - 23 items						
Check	09/16/2026	15531	AT&T		-366.71	-366.71
Check	09/16/2026	15527	Morris Levin & Son		-334.11	-700.82
Check	09/16/2026	15534	Reed Shaffer		-146.30	-847.12
Check	09/16/2026	15530	Battery Pro		-136.23	-983.35
Check	09/16/2026	15532	AT&T		-9.60	-992.95
Check	09/16/2026	15528	Torrez, Eddy E.		-8.64	-1,001.59
Check	09/23/2026	15537	CAL Turf Equipment...		-434.56	-1,436.15
Check	09/23/2026	15536	Uline, Inc.		-364.61	-1,800.76
Check	09/23/2026	15538	SoCalGas		-62.76	-1,863.52
Check	09/23/2026	15539	Cintas First Aid Safety		-50.99	-1,914.51
Check	09/30/2026	15544	Central Cal Landsca...		-22,500.00	-24,414.51
Check	09/30/2026	15545	Hilvers Farm Manag...		-4,807.34	-29,221.85
Check	09/30/2026	15543	Roche Oil, Inc.		-1,632.06	-30,853.91
Check	09/30/2026	JV	Tulare County Coun...		-1,414.30	-32,268.21
Check	09/30/2026	15542	PLOTBOX INC		-1,350.00	-33,618.21
Check	09/30/2026	15541	WM Corporate Servi...		-412.53	-34,030.74
Check	09/30/2026	15546	Leaf		-411.97	-34,442.71
Check	09/30/2026	15547	California Business ...		-277.84	-34,720.55
Check	09/30/2026	15550	CAL Turf Equipment...		-187.25	-34,907.80
Check	09/30/2026	15548	Ewing Irrigation Pro...		-177.46	-35,085.26
Check	09/30/2026	15551	Morris Levin & Son		-111.03	-35,196.29
Check	09/30/2026	15540	Rumsey, Jeremy		-96.48	-35,292.77
Check	09/30/2026	15549	Cintas First Aid Safety		-22.72	-35,315.49
Total Checks and Payments					-35,315.49	-35,315.49
Deposits and Credits - 2 items						
Deposit	09/30/2026				2,800.00	2,800.00
Deposit	09/30/2026				15,175.70	17,975.70
Total Deposits and Credits					17,975.70	17,975.70
Total Uncleared Transactions					-17,339.79	-17,339.79
Register Balance as of 09/30/2026					-81,981.37	137,978.26
New Transactions						
Checks and Payments - 13 items						
Check	10/13/2026	15556	Golden State Risk M...		-9,497.83	-9,497.83
Check	10/13/2026	15552	Barnes Memorials		-6,400.00	-15,897.83
Check	10/13/2026	JV	Health Benefits Unit		-6,088.88	-21,986.71
Check	10/13/2026	15557	City of Tulare		-4,190.56	-26,177.27
Check	10/13/2026	15555	Southern California ...		-2,555.67	-28,732.94
Check	10/13/2026	15553	Christy Vault Co, Inc.		-1,037.00	-29,769.94
Check	10/13/2026	15563	US Bank - CAL Card		-334.75	-30,104.69
Check	10/13/2026	15554	Roche Oil, Inc.		-291.59	-30,396.28
Check	10/13/2026	15558	Pinnacle Technology		-200.00	-30,596.28
Check	10/13/2026	15559	Res Com Pest Control		-100.00	-30,696.28
Check	10/13/2026	15561	ATT		-95.19	-30,791.47

Tulare Public Cemetery District
Reconciliation Detail
10500 · Cash in Treasury (772), Period Ending 09/30/2026

Type	Date	Num	Name	Clr	Amount	Balance
Check	10/13/2026	15562	Cintas First Aid Safety		-46.30	-30,837.77
Check	10/13/2026	15560	AT & T Mobility		-25.63	-30,863.40
Total Checks and Payments					-30,863.40	-30,863.40
Deposits and Credits - 1 item						
Deposit	10/09/2026				22,591.30	22,591.30
Total Deposits and Credits					22,591.30	22,591.30
Total New Transactions					-8,272.10	-8,272.10
Ending Balance					**-90,253.47**	**129,706.16**

Tulare Public Cemetery District
Reconciliation Summary
10600 · Endowment - Reserved (773), Period Ending 09/30/2026

	Sep 30, 26	
Beginning Balance		2,311,757.46
Cleared Transactions		
Deposits and Credits - 6 items	33,210.41	
Total Cleared Transactions	33,210.41	
Cleared Balance		**2,344,967.87**
Uncleared Transactions		
Deposits and Credits - 2 items	1,945.00	
Total Uncleared Transactions	1,945.00	
Register Balance as of 09/30/2026		**2,346,912.87**
New Transactions		
Deposits and Credits - 1 item	2,286.00	
Total New Transactions	2,286.00	
Ending Balance		**2,349,198.87**

Tulare Public Cemetery District
Reconciliation Detail
10600 · Endowment - Reserved (773), Period Ending 09/30/2026

Type	Date	Num	Name	Clr	Amount	Balance
Beginning Balance						2,311,757.46
Cleared Transactions						
Deposits and Credits - 6 items						
Deposit	09/04/2026			X	993.00	993.00
Deposit	09/11/2026			X	3,708.00	4,701.00
Deposit	09/18/2026			X	1,572.00	6,273.00
Deposit	09/25/2026			X	750.00	7,023.00
Deposit	09/25/2026			X	2,629.00	9,652.00
Deposit	09/30/2026			X	23,558.41	33,210.41
Total Deposits and Credits					33,210.41	33,210.41
Total Cleared Transactions					33,210.41	33,210.41
Cleared Balance					33,210.41	2,344,967.87
Uncleared Transactions						
Deposits and Credits - 2 items						
Deposit	09/30/2026				393.00	393.00
Deposit	09/30/2026				1,552.00	1,945.00
Total Deposits and Credits					1,945.00	1,945.00
Total Uncleared Transactions					1,945.00	1,945.00
Register Balance as of 09/30/2026					35,155.41	2,346,912.87
New Transactions						
Deposits and Credits - 1 item						
Deposit	10/09/2026				2,286.00	2,286.00
Total Deposits and Credits					2,286.00	2,286.00
Total New Transactions					2,286.00	2,286.00
Ending Balance					**37,441.41**	**2,349,198.87**

Tulare Public Cemetery District
Reconciliation Summary
10700 · Cash in Expansion Account (807), Period Ending 09/30/2026

	Sep 30, 26	
Beginning Balance		258,093.00
Cleared Transactions		
Deposits and Credits - 1 item	2,635.42	
Total Cleared Transactions	2,635.42	
Cleared Balance		**260,728.42**
Register Balance as of 09/30/2026		260,728.42
Ending Balance		260,728.42

Tulare Public Cemetery District
Reconciliation Detail
10700 · Cash in Expansion Account (807), Period Ending 09/30/2026

Type	Date	Num	Name	Clr	Amount	Balance
Beginning Balance						258,093.00
Cleared Transactions						
Deposits and Credits - 1 item						
Deposit	09/30/2026			X	2,635.42	2,635.42
Total Deposits and Credits					2,635.42	2,635.42
Total Cleared Transactions					2,635.42	2,635.42
Cleared Balance					2,635.42	260,728.42
Register Balance as of 09/30/2026					2,635.42	260,728.42
Ending Balance					**2,635.42**	**260,728.42**

Tulare Public Cemetery District
Reconciliation Summary
10900 · Endowment - Unreserved (817), Period Ending 09/30/2026

	Sep 30, 26	
Beginning Balance		81,344.20
Cleared Transactions		
Deposits and Credits - 1 item	830.62	
Total Cleared Transactions	830.62	
Cleared Balance		**82,174.82**
Register Balance as of 09/30/2026		82,174.82
Ending Balance		82,174.82

Tulare Public Cemetery District
Reconciliation Detail
10900 · Endowment - Unreserved (817), Period Ending 09/30/2026

Type	Date	Num	Name	Clr	Amount	Balance
Beginning Balance						81,344.20
Cleared Transactions						
Deposits and Credits - 1 item						
Deposit	09/30/2026			X	830.62	830.62
Total Deposits and Credits					830.62	830.62
Total Cleared Transactions					830.62	830.62
Cleared Balance					830.62	82,174.82
Register Balance as of 09/30/2026					830.62	82,174.82
Ending Balance					**830.62**	**82,174.82**

Tulare Public Cemetery District
Reconciliation Summary
10950 · Pre-Need Payment Plan (886), Period Ending 09/30/2026

	Sep 30, 26	
Beginning Balance		722,353.84
Cleared Transactions		
Deposits and Credits - 6 items	11,518.79	
Total Cleared Transactions	11,518.79	
Cleared Balance		**733,872.63**
Register Balance as of 09/30/2026		733,872.63
New Transactions		
Deposits and Credits - 2 items	2,627.07	
Total New Transactions	2,627.07	
Ending Balance		**736,499.70**

Tulare Public Cemetery District
Reconciliation Detail
10950 · Pre-Need Payment Plan (886), Period Ending 09/30/2026

Type	Date	Num	Name	Clr	Amount	Balance
Beginning Balance						722,353.84
Cleared Transactions						
Deposits and Credits - 6 items						
Deposit	09/04/2026			X	799.73	799.73
Deposit	09/14/2026			X	30.09	829.82
Deposit	09/15/2026			X	221.37	1,051.19
Deposit	09/18/2026			X	332.60	1,383.79
Deposit	09/25/2026			X	2,781.01	4,164.80
Deposit	09/30/2026			X	7,353.99	11,518.79
Total Deposits and Credits					11,518.79	11,518.79
Total Cleared Transactions					11,518.79	11,518.79
Cleared Balance					11,518.79	733,872.63
Register Balance as of 09/30/2026					11,518.79	733,872.63
New Transactions						
Deposits and Credits - 2 items						
Deposit	10/07/2026				85.00	85.00
Deposit	10/09/2026				2,542.07	2,627.07
Total Deposits and Credits					2,627.07	2,627.07
Total New Transactions					2,627.07	2,627.07
Ending Balance					**14,145.86**	**736,499.70**

Account Number :
Unique ID: XXXX XXXX XXXX
TRILBY L BARTON
Statement Date : 10-06-2026

Account Summary

Previous Balance	$0.00
Purchases and Other Charges	$334.75
Cash Advances	$0.00
Cash Advance Fees	$0.00
Late Payment Charges	$0.00
Credits	$321.28 CR
Payments	$0.00 PY
Total Activity	**$13.47**
Disputed Amount	$0.00

General Information

Total Activity $13.47

QUESTIONS OR TO REPORT A LOST OR STOLEN CARD, CALL CUSTOMER SERVICE**1-800-344-5696**

Account Messages

We certify that all purchases listed on this statement, unless annotated to the contrary, are true, correct and for official business only. Payment is authorized.

Cardholder Date Approver Date

New Activity

Post Date	Tran Date	Reference Number	Transaction Description	Amount
09-17	09-16	2469216625940240954 1982	INTUIT *QBOOKS ONLINE CL.INTUIT.COM CA	19.00
09-21	09-18	2413746626200192030 0472	USPS PO 0579510574 TULARE CA	179.70
09-28	09-25	74798266271000000000075	PAYMENT - THANK YOU 00000 C	321.28 PY
10-02	10-01	2413746627500164427 4529	USPS PO 0579510574 TULARE CA	19.73
10-05	10-02	2443105627636716026 4397	O'REILLY 6025 TULARE CA	116.32

CORPORATE PAYMENT SYSTEMS
P.O. BOX 6343
FARGO, ND 58125-6343

TULARE CEMETERY DISTRICT

Account Number:
Unique ID: XXXX XXXX XXXX
Amount Due: ~~$0.00~~ $334.75

106481079477316 S

TRILBY L BARTON
TULARE CEMETERY DIST
900 E. KERN AVE
TULARE CA 93274-4453

This area intentionally left blank.

Cardholder Activity

Name: TRILBY L BARTON **Account Number:** **8042 **Cycle End Date:** 10/06/2026

Trans Date / Posting Date	Merchant Name / City, State/Prov.	Transaction Total / Allocation Amount	Source Currency / Accounting Code	Currency Amount
09/16/2026 09/17/2026	INTUIT *QBOOKS ONLINE CL.INTUIT.COM, CA	**$19.00** $19.00	USD	19.00
09/18/2026 09/21/2026	USPS PO 0579510574 TULARE, CA	**$179.70** $179.70	USD	179.70
09/25/2026 09/28/2026	PAYMENT - THANK YOU 00000, C	**($321.28)** ($321.28)	USD	(321.28)
10/01/2026 10/02/2026	USPS PO 0579510574 TULARE, CA	**$19.73** $19.73	USD	19.73
10/02/2026 10/05/2026	O'REILLY 6025 TULARE, CA	**$116.32** $116.32	USD	116.32

Activity Totals	Purchases	Payments
$13.47	$334.75	($321.28)

Cardholder Name: _____ **Signature:** _____

Supervisor Name: _____ **Signature:** _____

District CC

Outlook

We received your Intuit subscription payment!

From Intuit <No_Reply@notifications.intuit.com>
Date Wed 9/16/2026 7:46 AM
To Manager <Manager@tularecemetery.net>



Payment success

Trilby Barton, thank you for your payment.

Invoice number:	10001529373974
Invoice date:	09/16/2026
Total:	$19.00
Payment method:	VISA ending in 8042

View billing history

Sign in to Intuit where you can see your billing history and view, save, and print your invoice.

District CC

UNITED STATES POSTAL SERVICE.

TULARE
340 E TULARE AVE
TULARE, CA 93274-9998
www.usps.com

10/01/2026 09:34 AM

Product	Qty	Unit Price	Price
First-Class Mail® Large Envelope Tulare, CA 93274 Weight: 0 lb 5.40 oz Estimated Delivery Date Mon 10/05/2026	1		$3.14
First-Class Mail® Large Envelope Tulare, CA 93274 Weight: 0 lb 5.10 oz Estimated Delivery Date Mon 10/05/2026	1		$3.14
First-Class Mail® Large Envelope Tulare, CA 93274 Weight: 0 lb 9.70 oz Estimated Delivery Date Mon 10/05/2026	1		$4.32
First-Class Mail® Large Envelope Tulare, CA 93274 Weight: 0 lb 5.30 oz Estimated Delivery Date Mon 10/05/2026	1		$3.14
First-Class Mail® Large Envelope Tulare, CA 93274 Weight: 0 lb 4.80 oz Estimated Delivery Date Mon 10/05/2026	1		$2.85
First-Class Mail® Large Envelope Tulare, CA 93274 Weight: 0 lb 5.70 oz Estimated Delivery Date Mon 10/05/2026	1		$3.14
Grand Total:			$19.73
Credit Card Remit Card Name: VISA Account #: XXXXXXXXXXXX8042 Approval #: 059444 Transaction #: 522 AID: A0000000031010 Contactless AL: VISA CREDIT			$19.73

District CC

UNITED STATES POSTAL SERVICE.

TULARE
340 E TULARE AVE
TULARE, CA 93274-9998
www.usps.com

09/18/2026 02:34 PM

Product	Qty	Unit Price	Price
First-Class Mail® Large Envelope Visalia, CA 93292 Weight: 0 lb 5.50 oz Estimated Delivery Date Mon 09/21/2026	1		$3.14
First-Class Mail® Large Envelope Stockton, CA 95209 Weight: 0 lb 5.50 oz Estimated Delivery Date Tue 09/22/2026	1		$3.14
First-Class Mail® Large Envelope Tulare, CA 93274 Weight: 0 lb 5.30 oz Estimated Delivery Date Mon 09/21/2026	1		$3.14
First-Class Mail® Large Envelope Tulare, CA 93274 Weight: 0 lb 5.70 oz Estimated Delivery Date Mon 09/21/2026	1		$3.14
First-Class Mail® Large Envelope Tulare, CA 93274 Weight: 0 lb 5.50 oz Estimated Delivery Date Mon 09/21/2026	1		$3.14
US Flag Coil/100	2	$82.00	$164.00
Grand Total:			$179.70
Credit Card Remit Card Name: VISA Account #: XXXXXXXXXXXX8042 Approval #: 065718 Transaction #: 423 AID: A0000000031010 Contactless AL: VISA CREDIT			$179.70

District CC

O'Reilly AUTO PARTS
PROFESSIONAL PARTS PEOPLE

Ford truck service

315 NORTH J STREET
TULARE, CA 93274
(559) 656-6820
www.oreillyauto.com

Store hours:
Mon-Sat: 07:00 AM-10:00 PM
Sun: 08:00 AM-09:00 PM

Counter #: 392460 Mike
Date: 10/02/2026 12:11 PM Drawer: 7
Invoice #: 6025-224860 6025WS155

MGD MSL51515 7.19 T
OIL FILTER
Special Offer,
(regular price 11.99,
you saved 4.80)

MGD MGA46174 6.59 T
AIR FILTER
Special Offer,
(regular price 10.99,
you saved 4.40)

MGD 33296 18.99 T
FUEL FILTER

LUC 10020 6.99 T
5.25OZFUELTR
MANUFACTURER'S DEFECT WARRANTY

PFM W83101 10.49 T
AC/FL DISC
LIMITED LIFETIME WARRANTY

SNT HI-SYN5-20 11.99 T
1QTMOTOROIL
Special Offer,
(regular price 11.99,
you saved 0.00)
MANUFACTURER'S DEFECT WARRANTY

SNT HI-SYN5-20 7.20 T
1QTMOTOROIL
Special Offer,
(regular price 11.99,
you saved 4.79)
MANUFACTURER'S DEFECT WARRANTY

I-SYN5-20 28.76 T
IOTOROIL 4 @ 7.19 EA
Special Offer,
(regular price 11.99,
you saved 19.20)
MANUFACTURER'S DEFECT WARRANTY

COC 101728 3.29
20OZ PWRD BB
30 DAY LIMITED WARRANTY
Bottle Depos 0.05

COC 101728 3.29
20OZ PWRD BB
30 DAY LIMITED WARRANTY
Bottle Depos 0.05

COC 102752 3.29
20OZ PWRD FP
30 DAY LIMITED WARRANTY
Bottle Depos 0.05

14 Items
Total Promotional Savings: 33.19
Total Local/Stat/Gvt Fees: 0.15

Sub-Total	108.22
Sales Tax	8.10
Total	116.32
VISA 8042	116.32

VISA XXXXXXXXXXXX8042 Auth CD: 015131
REF# 755468915269

Chip Indicator: Y
AID: A0000000031010
VISA CREDIT
TVR: 0000000000
TSI:
IAD: 06011203A00000

Thank you for being an O'Rewards member
$5 Reward issued for every 150 pts earned
Visit ORewards.com to view your account

Warranty/Garantía:
www.oreillyauto.com/warranty

0060252026100200224860O

Thank you for Shopping at
O'Reilly Auto Parts!

2026-2027 FY Burial Count Report with Fiscal Year Comparisons

Kern Cemetery Burials - 2026-2027 FY Tracking								
Month	**Single Casket Burial**	**Double-Depth 1st Burial**	**Double-Depth 2nd Burial**	**Niche (Cremation)**	**Cremation Burial***	**Baby Burial**	**Disinterments**	**Total Burials**
Jul-26	6	0	2	2	3	-	-	**13**
Aug-26	3	2	1	-	3	-	-	**9**
Sep-26	3	3	1	-	2	-	-	**9**
Totals:	**12**	**5**	**4**	**2**	**8**	**0**	**0**	**31**

Kern Cemetery Burials - Fiscal Year Comparison								
Fiscal Year	**Single Casket Burial**	**Double-Depth 1st Burial**	**Double-Depth 2nd Burial**	**Niche (Cremation)**	**Cremation Burial**	**Baby Burial**	**Disinterments**	**Total Burials**
2018-2019	84	-	-	11	56	1	-	**152**
2019-2020	98	-	-	22	46	-	-	**166**
2020-2021	118	-	-	29	69	1	-	**217**
2021-2022	99	-	-	22	50	-	2	**173**
2022-2023	64	-	15	32	41	1	-	**153**
2023-2024	38	21	23	17	37	-	1	**137**
2024-2025	26	18	23	9	53	2	-	**131**
2025-2026	16	20	24	25	60	-	-	**145**
2026-2027*	12	5	4	2	8	-	-	**31**

**Burial counts to-date for current fiscal year*

2026-2027 FY Burial Count Report with Fiscal Year Comparisons

North (J Street) Cemetery Burials - 2026-2027 FY Tracking								
Month	**Single Casket Burial**	**Double-Depth 1st Burial**	**Double-Depth 2nd Burial**	**Niche (Cremation)**	**Cremation Burial**	**Baby Burial**	**Disinterments**	**Total Burials**
Jul-26	3	5	2	-	1	-	-	**11**
Aug-26	1	6	2	-	2	-	-	**11**
Sep-26	3	4	3	-	-	1	-	**11**
Totals:	**7**	**15**	**7**	**-**	**3**	**1**	**-**	**33**

North (J Street) Cemetery Burials - Fiscal Year Comparison								
Fiscal Year	**Single Casket Burial**	**Double-Depth 1st Burial**	**Double-Depth 2nd Burial**	**Niche (Cremation)**	**Cremation Burial**	**Baby Burial**	**Disinterments**	**Total Burials**
2018-2019	98	-	-	-	12	0	-	**110**
2019-2020	131	-	-	-	19	3	1	**154**
2020-2021	196	-	-	-	38	7	1	**242**
2021-2022	149	-	-	-	28	2	-	**179**
2022-2023	129	-	14	-	24	4	-	**171**
2023-2024	57	47	18	-	39	4	-	**165**
2024-2025	30	64	30	-	38	1	-	**163**
2025-2026	30	65	29	-	28	3	-	**155**
2026-2027*	7	15	7	-	3	1	-	**33**

**Burial counts to-date for current fiscal year*

2026-2027 FY Burial Count Report with Fiscal Year Comparisons

Both Cemetery Locations Combined - 2026-2027 FY Tracking								
Month	**Single Casket Burial**	**Double-Depth 1st Burial**	**Double-Depth 2nd Burial**	**Niche (Cremation)**	**Cremation Burial**	**Baby Burial**	**Disinterments**	**Total Burials**
Jul-26	9	5	4	2	4	-	-	**24**
Aug-26	4	8	3	0	5	-	-	**20**
Sep-26	6	7	4	0	2	1	-	**20**
Totals:	**19**	**20**	**11**	**2**	**11**	**1**	**0**	**64**

Both Cemetery Locations Combined - Fiscal Year Comparison								
Fiscal Year	**Single Casket Burial****	**Double-Depth 1st Burial*****	**Double-Depth 2nd Burial**	**Niche (Cremation)**	**Cremation Burial**	**Baby Burial**	**Disinterments**	**Total Burials**
2018-2019	182	-	-	11	68	1	-	**262**
2019-2020	229	-	-	22	65	3	1	**320**
2020-2021	314	-	-	29	107	8	1	**459**
2021-2022	248	-	-	22	78	2	2	**352**
2022-2023	193	-	29	32	65	5	-	**324**
2023-2024	95	68	41	17	76	4	1	**302**
2024-2025	56	82	53	9	91	3	-	**294**
2025-2026*	46	85	53	25	88	3	-	**300**
2026-2027*	19	20	11	2	11	1	-	**64**

**Burial counts to-date for current fiscal year*

***2023-2024 FY through present-day is considered a single-casket burial count*

****Double depth burials included in single casket burial count from 2018-2019 FY through 2022-2023 FY.*

BEFORE THE BOARD OF TRUSTEES

TULARE PUBLIC CEMETERY DISTRICT

COUNTY OF TULARE, STATE OF CALIFORNIA

Resolution for Fund 817 Budget Amendment Resolution No. 2027-01

WHEREAS the Board of Trustees of the Tulare Public Cemetery District ("BOARD") voted to amend the 2026-2027 Fiscal Year Annual Budget for Fund 817 – Endowment Unreserved, authorizing the opening of an expense line in the Fund 817 account for transparency of the spending of the endowment interest, and close Budget Line 9100 – Transfer Out; and

IT IS HEREBY RESOLVED to open Budget Line 7066 – District Special Expense in the amount of $170,000 to fund maintenance and operations of the Tulare Public Cemetery District. This budget line will specifically track the spending of endowment fund interest during the 2026-2027 Fiscal Year.

IT IS HEREBY RESOLVED to close Budget Line 9100 – Transfer Out, originally opened for the transfer of $84,544 to Fund 772 in the approved 2026-2027 Fiscal Year budget. Budget Line 9100 is an internal budget line for the County of Tulare only, and the transfer out of funds is no longer needed with the approval of Budget Amendment Resolution 2026-01.

The foregoing budget amendment was adopted on motion by XXXXXXX, seconded by Trustee XXXXXXX, at a regular meeting of the Board of Trustees held on October 27, 2026 by the following vote:

AYES:
NOES:
ABSTAIN:
ABSENT:

IT IS FURTHER RESOLVED that this resolution will be forwarded to the Tulare County Auditor-Controller for further consideration under Government Code Section 29125.

ATTEST:

_____

Trilby Barton, Board Clerk

APPROVED BUDGET - SPECIAL DISTRICTS
FINAL BUDGET FOR FISCAL YEAR 2026-2027

DISTRICT NAME Tulare Public Cemetery District FUND NO 817

(USE WHOLE DOLLARS ONLY-NO CENTS)

			2025-2026 Budget/Actual (OPTIONAL)*	2026-2027 Budget
AVAILABLE RESOURCES				
CASH				
1.	Cash Balance - July 1, 2026	$	$252,998	$81,344
	Less Cash Reserves: (Specify)			
2.			-	-
3.			-	-
4.			-	-
5.	Total Beginning Cash Available **(Line 1 minus Lines 2 thru 4)**	$	$252,998	$81,344

BUDGETED REVENUES **(See your monthly BA-A203 report for a listing of your revenue accounts)**

		ACCOUNT		
6.	Property Taxes-Current Secured	4001	-	-
7.	Property Taxes-Current Unsecured	4006	-	-
8.	Property Taxes-Prior Secured	4008	-	-
9.	Property Taxes-Prior Unsecured	4009	-	-
10.	Supp. Property Taxes-Current Secured	4030	-	-
11.	Supp. Property Taxes-Prior	4033	-	-
12.	Other Taxes	4052	-	-
13.	Interest (in PPP)	4801	$500	$3,200
14.	Use of money and property	4800	-	-
15.	Rents and Concessions	4807	-	-
16.	Aid From Other Governmental Agencies	5000	-	-
17.	St Homeowners Property Tax Relief	5050	-	-
18.	St Aid-Supp. Subvention-SD	5052	-	-
19.	Charges for Current Services	5400	-	-
20.	Charges for Cur Serv-Water & Sewer	5531	-	-
21.	Burial Fee	5542	-	-
22.	Miscellaneous Revenues	5805	-	-
23.	Other Sales-Taxable	5816	-	-
24.	Other Revenue	5835	-	$88,619.51
25.	Operating Transfer-In	9200	$73,322	-
26.			-	-
27.	Total Budgeted Revenues **(Lines 6 thru 26)**	Total $	$73,822	~~$8,200~~ $91,819.51
28.	**Total Available Resources** **(Line 5 plus Line 27)**	Total $	$326,820	~~$84,544~~ $176,363.51

*** Prior year budget/actual is optional as a reference only**

APPROVED BUDGET - SPECIAL DISTRICTS
FINAL BUDGET FOR FISCAL YEAR 2026-2027

DISTRICT NAME Tulare Public Cemetery District FUND NO 817

(USE WHOLE DOLLARS ONLY-NO CENTS)

APPROPRIATIONS		ACCOUNT	**2025-2026 Budget/Actual (Optional)***	**2026-2027 Budget**
BUDGETED EXPENDITURES **(See your monthly BA-A103 report for a listing of your expenditure accts.)**				
29.	Salaries and Employee Benefits	6000 **	-	-
30.	Regular Salaries	6001	-	-
31.	Overtime	6002	-	-
32.	Benefits (i.e. Health Insurance, life Insurance, Unemployment Insurance)	6004	-	-
33.	Extra Help	6005	-	-
34.	Director's Fees	7012	-	-
35.	Retirement-SD Portion	6011	-	-
36.	Social Security	6012	-	-
37.	Workers' Comp Ins	6015	-	-
38.			-	-
39.			-	-
40	Total Salaries and Employee Benefits **(Lines 29 thru 39)**	Total $	$0	$0
41.	Services and Supplies	7000 **	-	-
42.	Agricultural	7001	-	-
43.	Clothing and Personal Supplies	7004	-	-
44.	Telecommunications (phone bill)	7005	-	-
45.	Cost of Supplies Reisssued	7006	-	-
46.	Food	7007	-	-
47.	Household Expense	7009	-	-
48.	Insurance	7010	-	-
49.	Maintenance-Equipment	7021	-	-
50.	Maintenance-Bldg & Improvements	7024	-	-
51.	Memberships	7027	-	-
52.	Office Expense	7036	-	-
53.	Professional and Specialized Expense	7043	-	-
54.	Publications and Legal Notices	7059	-	-
55.	Rent & Leases-Equipment	7061	-	-
56.	Rent & Leases-Bldg & Improvements	7062	-	-
57.	Small Tools and Instruments	7065	-	-
58.	District Special Expense	7066	-	$170,000.00
59.	Training	7073	-	-
60.	Transportation and Travel	7074	-	-
61.	Utilities	7081	-	-
62.	Transfer-Out	9100	$250,000	~~$84,544~~ $0.00
63.			-	-
64.			-	-
65.			-	-
66.	Total Services and Supplies **(Lines 41 thru 65)**	Total $	$250,000	~~$84,544~~ $170,000.00

** **Special Districts that keep their own books must use account numbers 6000, 7000, etc.; Special Districts whose books are maintained by the Tulare County Auditor use line item account numbers**

APPROVED BUDGET - SPECIAL DISTRICTS
FINAL BUDGET FOR FISCAL YEAR 2026-2027
PAGE 3 OF 3

DISTRICT NAME Tulare Public Cemetery District FUND NO. 817

(USE WHOLE DOLLARS ONLY-NO CENTS)

APPROPRIATIONS			**2025-2026 Budget/Actual (Optional)***	**2026-2027 Budget**
	BUDGETED EXPENDITURES	ACCOUNT		
67.	Other Charges	7400	-	-
68.	Contributions to Other Agencies	7407	-	-
69.	Repayment-Long Term Debt (Bonds)	7413	-	-
70.	Interest-Long Term Debt (Bonds)	7415	-	-
71.	Repayment-Long Term Debt (Other)	7417	-	-
72.	Interest-Long Term Debt (Other)	7418	-	-
73.	Taxes and Assessments	7425	-	-
74.	Other Charges	7428	-	-
			-	-
75.	Total Other Charges **(Lines 67 thru 74)**	Total $	$0	$0
	Fixed Assets (Specify) ***			
76.	Land	8000 ***	-	-
77.	Repurchase of Grave Site	8001	-	-
78.	Building and Improvements	8100	-	-
79.	Equipment	8300	-	-
80.			-	-
81.			-	-
82.			-	-
83.	Total Fixed Assets **(Lines 76 thru 83)**	Total $	$0	$0
	CONTINGENCIES			
84.	Appropriation for Contingencies	7432 (1)	-	-
85.			-	-
86.	Total Contingencies **(Lines 84 thru 86)**	Total $	$0	$0
87.	**Total Appropriations** **(Lines 40,66,75,83, 86)**	Total $	$250,000	~~$84,640~~ $170,000
88.	Difference Between Resources and Appropriations **(Line 28 minus Line 87 should be zero)**	$	$76,820	$0

(1) Recommend 15% of total expenditures.

*** **Special Districts that keep their own books must use account numbers 6000, 7000, 8000. Detail records are kept by the district.**

Board Approval Date July 28, 2026

Board President Signature Ryan Wilson

Contact Person Trilby Barton, District Manager

Telephone Number 559-686-5544

Budget Amended: October 27, 2026
Board President Signature:

Due Date: August 31, 2026

Email: Claims@tularecounty.ca.gov

BEFORE THE BOARD OF TRUSTEES

TULARE PUBLIC CEMETERY DISTRICT

COUNTY OF TULARE, STATE OF CALIFORNIA

Resolution for Transfer of Endowment Interest from Fund 773 to Fund 817

Resolution No. 2027-02

WHEREAS the Board of Trustees of the Tulare Public Cemetery District ("BOARD") voted to authorize the transfer of interest earned in the Fund 773 – Endowment Reserved during the 2023-2024 Fiscal Year (remaining interest not previously transferred) and 2025-2026 Fiscal Year to the Fund 817 – Endowment Unreserved account; and

IT IS HEREBY RESOLVED to transfer $377.01 of endowment interest from the 2023-2024 Fiscal Year that was not previously transferred from Fund 773 to Fund 817, and transfer $88,242.50 of endowment interest from the 2025-2026 Fiscal Year to Fund 773 to Fund 817. The total amount of endowment interest to be transferred into Fund 817 totals $88,619.51.

The foregoing budget amendment was adopted on motion by XXXXXXX, seconded by Trustee XXXXXXX, at a regular meeting of the Board of Trustees held on October 27, 2026 by the following vote:

AYES:
NOES:
ABSTAIN:
ABSENT:

IT IS FURTHER RESOLVED that this resolution will be forwarded to the Tulare County Auditor-Controller for further consideration under Government Code Section 29125.

ATTEST:

_____

Trilby Barton, Board Clerk

BEFORE THE BOARD OF TRUSTEES

TULARE PUBLIC CEMETERY DISTRICT

COUNTY OF TULARE, STATE OF CALIFORNIA

Resolution for Fund 886 Budget Amendment Resolution No. 2027-03

WHEREAS the Board of Trustees of the Tulare Public Cemetery District ("BOARD") voted to amend the 2026-2027 Fiscal Year Annual Budget for Fund 886 – Pre-Payment Plan, authorizing the close of Budget Line 9100 – Transfer Out and opening of Budget Line 7066 – District Special Expense; and

IT IS HEREBY RESOLVED to close Budget Line 9100 – Transfer Out, originally opened for the transfer of $30,000 to Fund 772 and/or Fund 773 in the approved 2026-2027 Fiscal Year budget. Budget Line 9100 is an internal budget line for the County of Tulare only.

IT IS HEREBY RESOLVED to open Budget Line 7066 – District Special Expense in the amount of $30,000 to transfer to Fund 772 and/or Fund 773 after Fund 886 has been thoroughly researched to determine amounts owed to Fund 772 and Fund 773 from Fund 886.

The foregoing budget amendment was adopted on motion by XXXXXXX, seconded by Trustee XXXXXXX, at a regular meeting of the Board of Trustees held on October 27, 2026 by the following vote:

AYES:
NOES:
ABSTAIN:
ABSENT:

IT IS FURTHER RESOLVED that this resolution will be forwarded to the Tulare County Auditor-Controller for further consideration under Government Code Section 29125.

ATTEST:

_____

Trilby Barton, Board Clerk

APPROVED BUDGET - SPECIAL DISTRICTS
FINAL BUDGET FOR FISCAL YEAR 2026-2027

DISTRICT NAME Tulare Public Cemetery District FUND NO 886

(USE WHOLE DOLLARS ONLY-NO CENTS)

			2025-2026 Budget/Actual (OPTIONAL)*	2026-2027 Budget
AVAILABLE RESOURCES				
CASH				
1.	Cash Balance - July 1, 2026	$	$374,149	$715,030
	Less Cash Reserves: (Specify)			
2.			-	-
3.			-	-
4.			-	-
5.	Total Beginning Cash Available **(Line 1 minus Lines 2 thru 4)**	$	$374,149	$715,030
BUDGETED REVENUES	**(See your monthly BA-A203 report for a listing of your revenue accounts)**			
		ACCOUNT		
6.	Property Taxes-Current Secured	4001	-	-
7.	Property Taxes-Current Unsecured	4006	-	-
8.	Property Taxes-Prior Secured	4008	-	-
9.	Property Taxes-Prior Unsecured	4009	-	-
10.	Supp. Property Taxes-Current Secured	4030	-	-
11.	Supp. Property Taxes-Prior	4033	-	-
12.	Other Taxes	4052	-	-
13.	Interest (in PPP)	4801	$16,093	$20,000
14.	Use of money and property	4800	-	-
15.	Rents and Concessions	4807	-	-
16.	Aid From Other Governmental Agencies	5000	-	-
17.	St Homeowners Property Tax Relief	5050	-	-
18.	St Aid-Supp. Subvention-SD	5052	-	-
19.	Charges for Current Services	5400	-	-
20.	Charges for Cur Serv-Water & Sewer	5531	-	-
21.	Burial Fee	5542	$215,000	$50,000
22.	Miscellaneous Revenues	5805	-	-
23.	Other Sales-Taxable	5816	-	-
24.	Other Revenue	5835	-	-
25.	Operating Transfer-In	9200	$200,000	-
26.			-	-
27.	Total Budgeted Revenues **(Lines 6 thru 26)**	Total $	$431,093	$70,000
28.	**Total Available Resources** **(Line 5 plus Line 27)**	Total $	$805,242	$785,030

*** Prior year budget/actual is optional as a reference only**

APPROVED BUDGET - SPECIAL DISTRICTS
FINAL BUDGET FOR FISCAL YEAR 2026-2027

DISTRICT NAME Tulare Public Cemetery District FUND NO 886

(USE WHOLE DOLLARS ONLY-NO CENTS)

APPROPRIATIONS		ACCOUNT	**2025-2026 Budget/Actual (Optional)***	**2026-2027 Budget**
BUDGETED EXPENDITURES **(See your monthly BA-A103 report for a listing of your expenditure accts.)**				
29.	Salaries and Employee Benefits	6000 **	-	-
30.	Regular Salaries	6001	-	-
31.	Overtime	6002	-	-
32.	Benefits (i.e. Health Insurance, life Insurance, Unemployment Insurance)	6004	-	-
33.	Extra Help	6005	-	-
34.	Director's Fees	7012	-	-
35.	Retirement-SD Portion	6011	-	-
36.	Social Security	6012	-	-
37.	Workers' Comp Ins	6015	-	-
38.			-	-
39.			-	-
40	Total Salaries and Employee Benefits **(Lines 29 thru 39)**	Total $	$0	$0
41.	Services and Supplies	7000 **	-	-
42.	Agricultural	7001	-	-
43.	Clothing and Personal Supplies	7004	-	-
44.	Telecommunications (phone bill)	7005	-	-
45.	Cost of Supplies Reisssued	7006	-	-
46.	Food	7007	-	-
47.	Household Expense	7009	-	-
48.	Insurance	7010	-	-
49.	Maintenance-Equipment	7021	-	-
50.	Maintenance-Bldg & Improvements	7024	-	-
51.	Memberships	7027	-	-
52.	Office Expense	7036	-	-
53.	Professional and Specialized Expense	7043	-	-
54.	Publications and Legal Notices	7059	-	-
55.	Rent & Leases-Equipment	7061	-	-
56.	Rent & Leases-Bldg & Improvements	7062	-	-
57.	Small Tools and Instruments	7065	-	-
58.	District Special Expense	7066	-	$30,000.00
59.	Training	7073	-	-
60.	Transportation and Travel	7074	-	-
61.	Utilities	7081	-	-
62.	Transfer-Out	9100	$6,092	~~$30,000~~
63.			-	-
64.			-	-
65.			-	-
66.	Total Services and Supplies **(Lines 41 thru 65)**	Total $	$6,092	$30,000

** **Special Districts that keep their own books must use account numbers 6000, 7000, etc.; Special Districts whose books are maintained by the Tulare County Auditor use line item account numbers**

APPROVED BUDGET - SPECIAL DISTRICTS
FINAL BUDGET FOR FISCAL YEAR 2026-2027
PAGE 3 OF 3

DISTRICT NAME Tulare Public Cemetery District FUND NO 886

(USE WHOLE DOLLARS ONLY-NO CENTS)

APPROPRIATIONS			**2025-2026 Budget/Actual (Optional)***	**2026-2027 Budget**
	BUDGETED EXPENDITURES	ACCOUNT		
67.	Other Charges	7400	-	-
68.	Contributions to Other Agencies	7407	-	-
69.	Repayment-Long Term Debt (Bonds)	7413	-	-
70.	Interest-Long Term Debt (Bonds)	7415	-	-
71.	Repayment-Long Term Debt (Other)	7417	-	-
72.	Interest-Long Term Debt (Other)	7418	-	-
73.	Taxes and Assessments	7425	-	-
74.	Other Charges	7428	-	-
			-	-
75.	Total Other Charges **(Lines 67 thru 74)**	Total $	$0	$0
	Fixed Assets (Specify) ***			
76.	Land	8000 ***	-	-
77.	Repurchase of Grave Site	8001	-	-
78.	Building and Improvements	8100	-	-
79.	Equipment	8300	-	-
80.			-	-
81.			-	-
82.			-	-
83.	Total Fixed Assets **(Lines 76 thru 83)**	Total $	$0	$0
	CONTINGENCIES			
84.	Appropriation for Contingencies	7432 (1)	-	-
85.			-	-
86.	Total Contingencies **(Lines 84 thru 86)**	Total $	$0	$0
87.	**Total Appropriations** **(Lines 40,66,75,83, 86)**	Total $	$6,092	$30,000
88.	Difference Between Resources and Appropriations (Line 28 minus Line 87 should be zero)	$	$799,150	$755,030

(1) Recommend 15% of total expenditures.

*** **Special Districts that keep their own books must use account numbers 6000, 7000, 8000. Detail records are kept by the district.**

Board Approval Date July 28, 2026

Board President Signature Bryan Wilson

Contact Person Trilby Barton, District Manager

Telephone Number 559-686-5544

Budget Amended: October 27, 2026
Board President Signature:

Due Date: August 31, 2026

Email: Claims@tularecounty.ca.gov

Tulare Public Cemetery District

Emergency Action Plan

Drafted November 2025; Approved January 2026; Updated October 2026

Reviewed by GSRMA and Tulare County Risk Assessment Department

Adopted by the Tulare Public Cemetery District Board of Trustees on January 27, 2026

Updated & Reviewed by Tulare Public Cemetery Board of Trustees on October 27, 2026

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Introduction

This document is a safety program required by Cal/OSHA in the event of an emergency. Examples: Earthquakes, active assailants, and structure fires. This document must be stored in a location where employees can access it at any time during work hours.

Contacts

For any questions regarding this plan, contact:

Representative(s) Responsible for Maintaining this Plan:

Trilby Barton, District Manager~~rme nt Consultant~~
Tel: 559-686-5544
Cell:
Email: manager@tularecemetery.net

James Corral, Grounds Supervisor
Tel: 559-686-5544
Cell:

Lydia Cervantes, Administrative Assistant
Tel: 559-686-5544
Email: lydia@tularecemetery.net

Emergency Action Plan Overview

The following emergency action plan has been commissioned and maintained by Tulare Public Cemetery District in compliance with California Code of Regulations, Title 8, Section 3220, 3203 and 6184.

The elements of this plan, as required by OSHA's 29 CFR 1926.35, are as follows:

A. Emergency Evacuation Plan
B. Critical Operations
C. Methods to Account for District Employees
D. Rescue and Medical Duties
E. Means of Reporting Emergencies
F. District Representative(s) Responsible for Plan

Although Tulare Public Cemetery District (District) takes precautions to prevent them, emergencies may occur. When they do, they require quick, correct and decisive responses. District employees have been informed of the company's planned response to emergency situations, and they are expected to adhere to these guidelines at both cemetery locations, 900 E. Kern Ave (Kern Site) and 4572 N. J Street (North Site), located in Tulare, California.

The designated Safety Officer of each cemetery location will:

1. Customize the emergency action plan fields for each facility (floor plans, layouts, etc.)
2. Maintain accurate records of personnel assigned to each site and alternate contact information for the personnel in the Appendix: Personnel Roster
3. Develop emergency evacuation routes
4. Develop locations for assembly points
5. Develop an emergency action plan training curriculum
6. Develop an emergency action plan exercise procedure and schedule

Employees will be trained on emergency action plan procedures. It is critical that this training develops a demonstrable competency for safely and uniformly reacting to and responding to emergency situations.

A. Emergency Response Team

In the event of an emergency, a pre-designated group of staff will respond to the incident, while all other staff will follow Evacuation or Lockdown protocol. The purpose of the Emergency Response Team is to direct the evacuation or shelter in place procedures during an emergency situation. An Emergency Manager will be designated to oversee all emergencies and follow the instructions in Appendix F: Emergency Manager Duties.

The following duties will be performed by the Emergency Response Team:

- Assist in alerting personnel to evacuate or take shelter
- Ensure safety of emergency exits and direct personnel accordingly
- Evaluate assembly points for safety and security
- Conduct sweep of the building if safe to do so
- Assist with evacuating disabled persons
- Assist with evacuating public
- Obtain Emergency Roster before exiting the building if safe to do so
- Conduct roll call
- Assist Law Enforcement or Safety Personnel as needed

Emergency Manager(s):

Kern Cemetery Location – Grounds

- Primary: James Corral, Grounds Supervisor
- Secondary (if primary is absent): Bobby Jones, Groundskeeper III

Kern Cemetery Location – Office

- Primary: Trilby Barton, District Manage~~ment Consultant~~r
- Secondary (if primary is absent): Lydia Cervantes, Administrative Assistant

North J Street Cemetery Location

- Primary: ~~Eddy Torrez~~Jeremy Rumsey, Groundskeeper II~~I~~
- Secondary (if primary is absent): ~~Jeremy Rumsey~~Ernest Murillo, Groundskeeper I~~I~~

Response Team:

- Trilby Barton, District Manage~~rment Consultant~~
- James Corral, Grounds Supervisor
- Bobby Jones, Groundskeeper III

- Lydia Cervantes, Administrative Assistant
- ~~Eddy Torrez, Groundskeeper II~~
- Jeremy Rumsey, Groundskeeper III
- Ernest Murillo, Groundskeeper I

Emergency Response Personnel will be trained:

- Prior to the implementation of the Emergency Aaction Ppplan
- Annually
- When the plan is updated or changed
- When Emergency Response Team responsibilities or personnel changes

B. Rescue and Medical Duties

Rescue and medical duties will be performed according to the training qualifications of the below personnel.

1. This crew has been specifically trained to rescue and/or attend to injured employees. Yes

   Employees trained in rescue operations and/or medical first aid will perform duties according to the training they have received, and will rely on paramedics or other emergency rescue teams for emergency situations out of their training purview. The remaining employees will meet at the designated meeting area.

Rescue and Medical Personnel and Training:

- Lydia Cervantes, Administrative Assistant, Adult & Pediatric First Aid, CPR & AED Certification
- Phyllis Schneider, Office Manager, Adult & Pediatric First Aid, CPR & AED Certification
- James Corral, Grounds Supervisor, Adult & Pediatric First Aid, CPR & AED Certification
- Bobby Jones, Groundskeeper III, Adult & Pediatric First Aid, CPR & AED Certification
- Eddy Torrez, Groundskeeper II, Adult & Pediatric First Aid, CPR & AED Certification
- ~~Chris Harrison, Groundskeeper (On-Call), Adult & Pediatric First Aid, CPR & AED Certification~~
- ~~Jaron Pimentel, Groundskeeper (On-Call), Adult & Pediatric First Aid, CPR & AED Certification~~

C. Critical Operations Duties

Critical Operations Responders may be necessary to perform critical operations duties prior to an emergency evacuation if it is safe to do so. Critical operations are those that pose a risk to facility personnel or emergency responders. Each responder will be trained to prior to the implementation of the Emergency Action Plan, when personnel changes, or as listed.

Combustion Engines, Electrical Tools and Propane

If any emergency occurs on a cemetery site involving combustion engine equipment or electrical tools, District employees will turn off all equipment before evacuating, provided the employee's safety is not jeopardized by doing so.

Propane is not utilized in any District equipment or buildings. The Grounds Supervisor and Grounds crew members who will be digging graves will be educated on where gas lines are located on the cemetery sites. Questions to be asked or aware of for all employees on District properties:

1. Does this cemetery site(s) involve the use of propane? No
2. Does this cemetery site(s) involve the use of combustion engine equipment? Yes
3. Does this cemetery site(s) involve the use of electrical tools or other ignition sources? Yes
4. Does this cemetery site(s) involve the use of other critical operations not listed? Yes, the cemetery sites utilize chemicals, oils, gasoline, and aerosol products. All these products are safely stored within the shops at each cemetery site.

If District employees cannot shut off engine equipment or electrical tools, the Tulare Fire Department (Kern Site) or Tulare County Fire Department (North Site) or other responding emergency personnel will be notified of the presence so they can assess and turn off the power sources. Emergency personnel will also be notified upon arrival of the locations of equipment and combustible products such as fuel and chemicals.

If an emergency situation occurs in the shop area, the Emergency Manager will lock the fireproof hazardous material cabinet and secure the storage room or shop door, if safe conditions exist prior to evacuating. The Emergency Manager will notify fire and other emergency personnel upon their arrival of the hazardous materials on site.

Training Schedule

Grounds and office employees will be trained every six months and upon personnel change to ensure they are up to date on the emergency action plan. All employees should be aware and knowledgeable of the Emergency Action Plan as it relates to both grounds and office evacuations.

Upon hire, new employees will receive an initial training which will include an overview of the Emergency Action Plan, a tour of the primary facility they will be working at with exits pointed out, along with eye wash stations, the location of first aid kits and protective gear they will need access. New employees will also be properly educated by the District Manager and designated grounds staff on how to safely operate equipment.

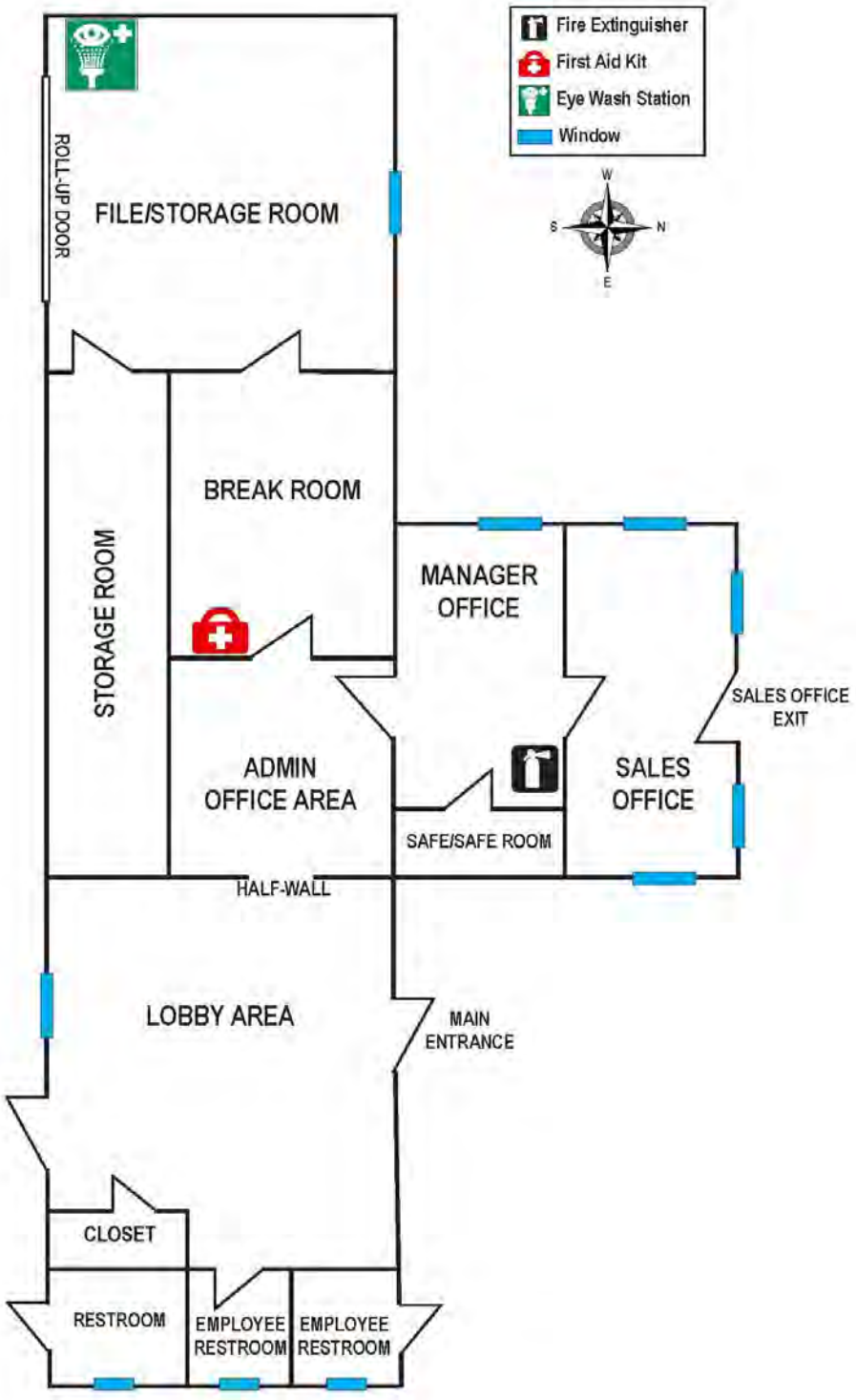
The Safety Committee will be responsible for scheduling and conducting a minimum of two trainings per year. Each training will consist of reviewing the Emergency Action Plan, highlighting any changes or updates, and conducting an evacuation drill. An evacuation drill will be held at each cemetery location once per year, with all Grounds staff required to participate at each location. Grounds staff may work at both locations throughout the year and should be familiar with emergency action plans for both the Kern Cemetery and North J Street Cemetery. Office staff will participate in the evacuation drills held at the Kern Cemetery location.

A summary of each training's curriculum will be documented, along with the date and location of the training, and a sign-in sheet documenting each employee completed the required training.

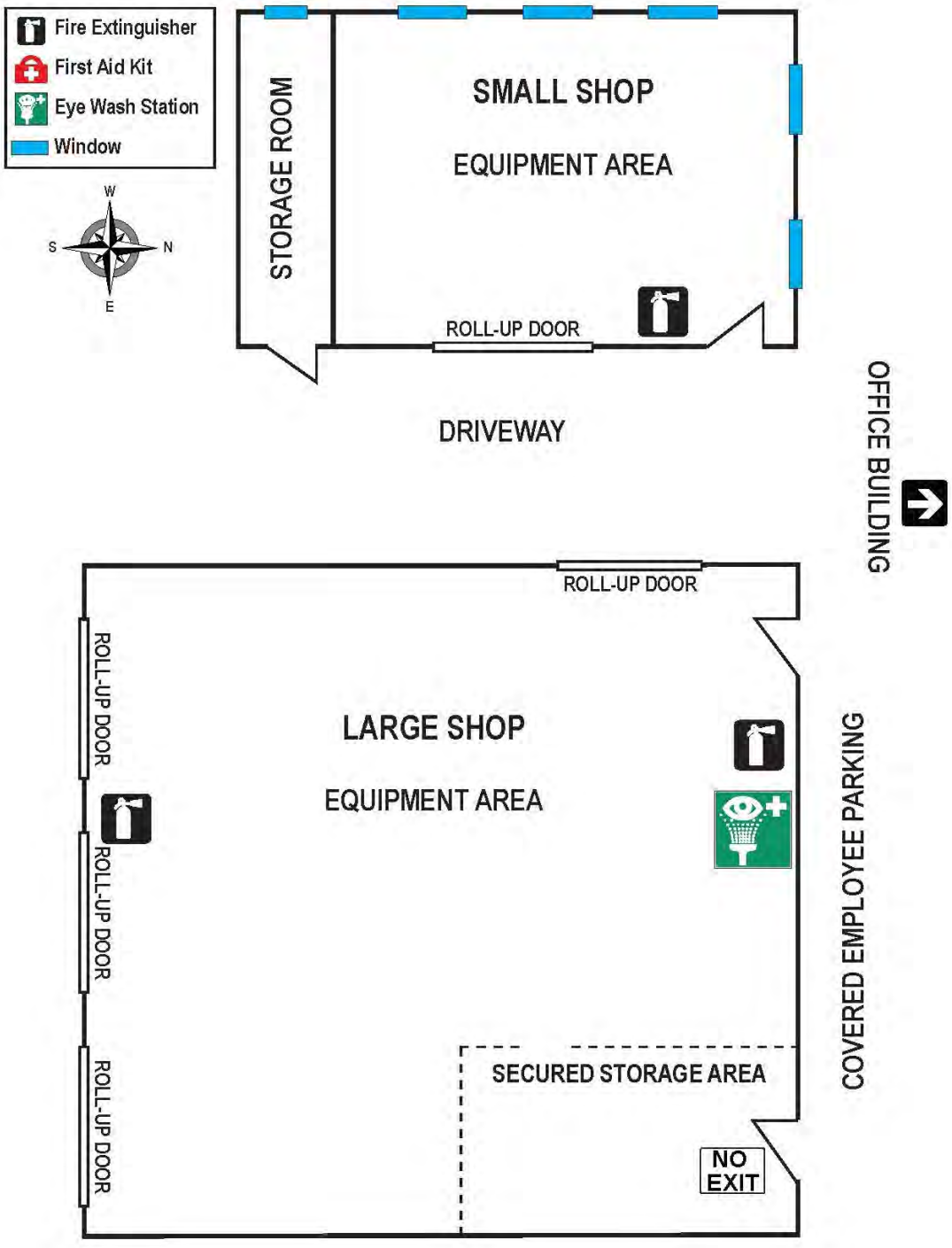
D. Fire Extinguisher and First Aid Kit Locations

Fire Extinguishers and First Aid Kits will be inspected annually using the Safety Inspection Checklist. Fire extinguishers and first aid kits are located in the following areas:

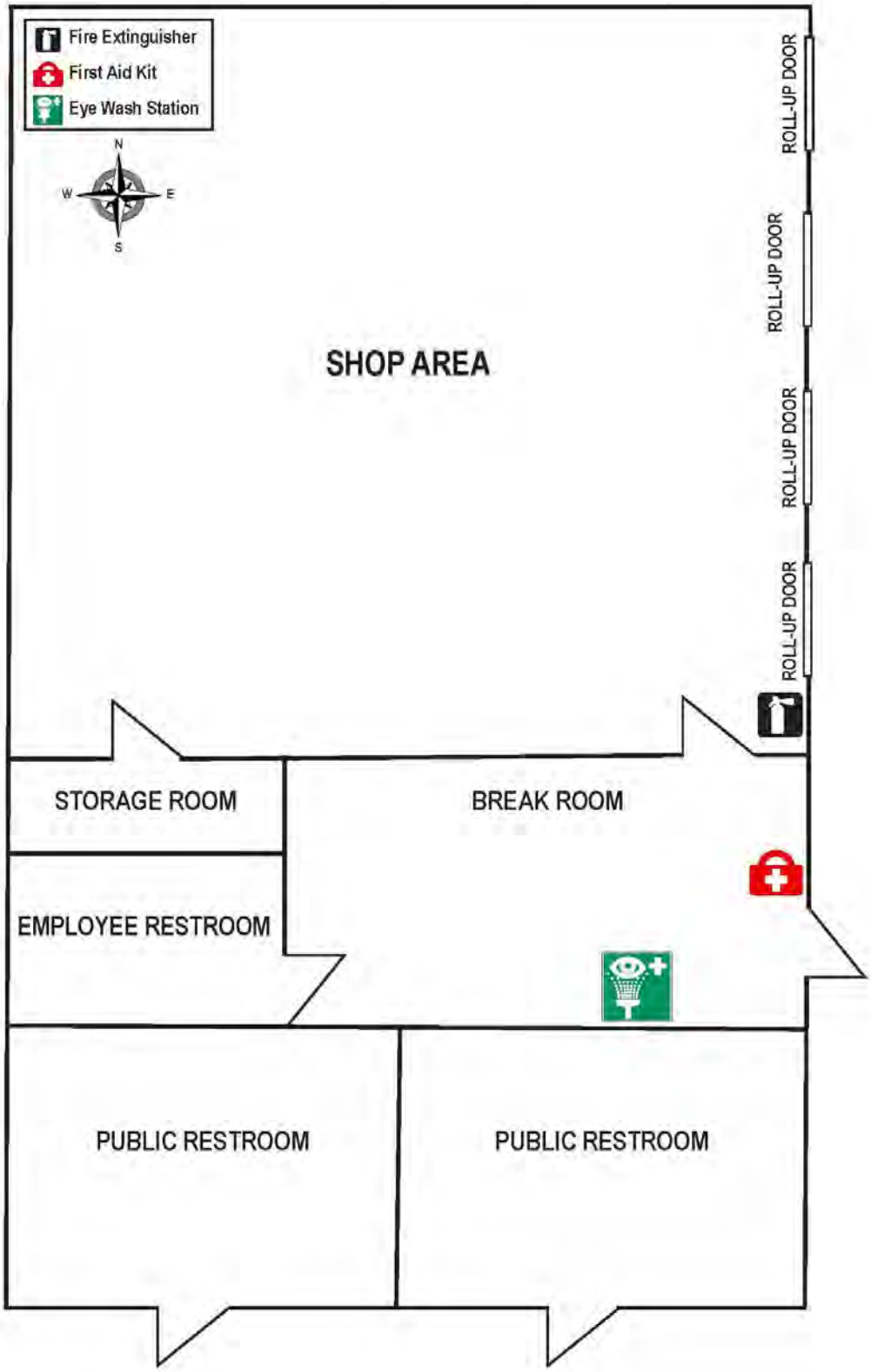
Kern Cemetery Location – Office Building



Kern Cemetery Location – Shop Buildings



North J Street Cemetery Location – Shop Building



E. Emergency Evacuation Plan

Roof Evacuations:

While not common for District employees to be working on projects from the roof, there would be scenarios when it may require employees or outside contractors to complete needed roof repairs or other related-projects.

In addition, the shop building at the Kern Site does have a second story utilized for storage, but there is not direct roof access. Any evacuations affecting the second story will need to be done quickly via the stairs.

If an emergency occurs requiring evacuation of the roof, the procedures are as follows:

1. Assess the situation – Is it fire, water, a fallen tree or ~~lightinglightning~~ strike?
2. If evacuating the roof quickly and safely is possible, employees should do so immediately via the ladder or other method they used to gain access to the roof.
3. Call 911 for emergency assistance as urgently as possible.
4. If evacuation of the roof is not possible, all persons on the roof should gather together in the safest area of the roof, and a headcount should be taken to identify if anyone is missing or potentially injured.
5. Contact the District Manager ~~and/or Grounds Supervisor~~ to notify them of the situation if they are not currently on site.
6. Once evacuated, all employees (or contractors) should meet at the front main entrance at the cemetery site for a final headcount to ensure everyone is safe and accounted for.

Grounds Evacuations:

If there is an emergency on the grounds of either the Kern Site or North Site, the procedures for safe evacuation procedures are as follows:

1. Stay calm and act swiftly.
2. Leave the affected area immediately and report to the main entrance of the cemetery site.
3. Call out to any members of the public on site and direct them to the main entrance of the cemetery site.
4. Call 911 for emergency assistance as urgently as possible.
5. Contact the District Manager ~~and/or Grounds Supervisor~~ to notify them of the situation if they are not currently on site.
6. Once emergency personnel is on the way to the location, conduct a headcount of all employees and take note of any member of the public to ensure everyone is safely accounted for, and assess the need for any medical attention.
7. Report to emergency personnel as they arrive on site the nature of the emergency and any individuals needing medical attention, directing them to the most crucial first.

8. If an employee or member of the public is injured to the point they are not able to get to the main entrance of the cemetery, a fellow employee may stay with them to assist in lifesaving measures such as pressure on wounds, etc. if the situation allows for them to safely do so.

Shop & Office Building Evacuations:

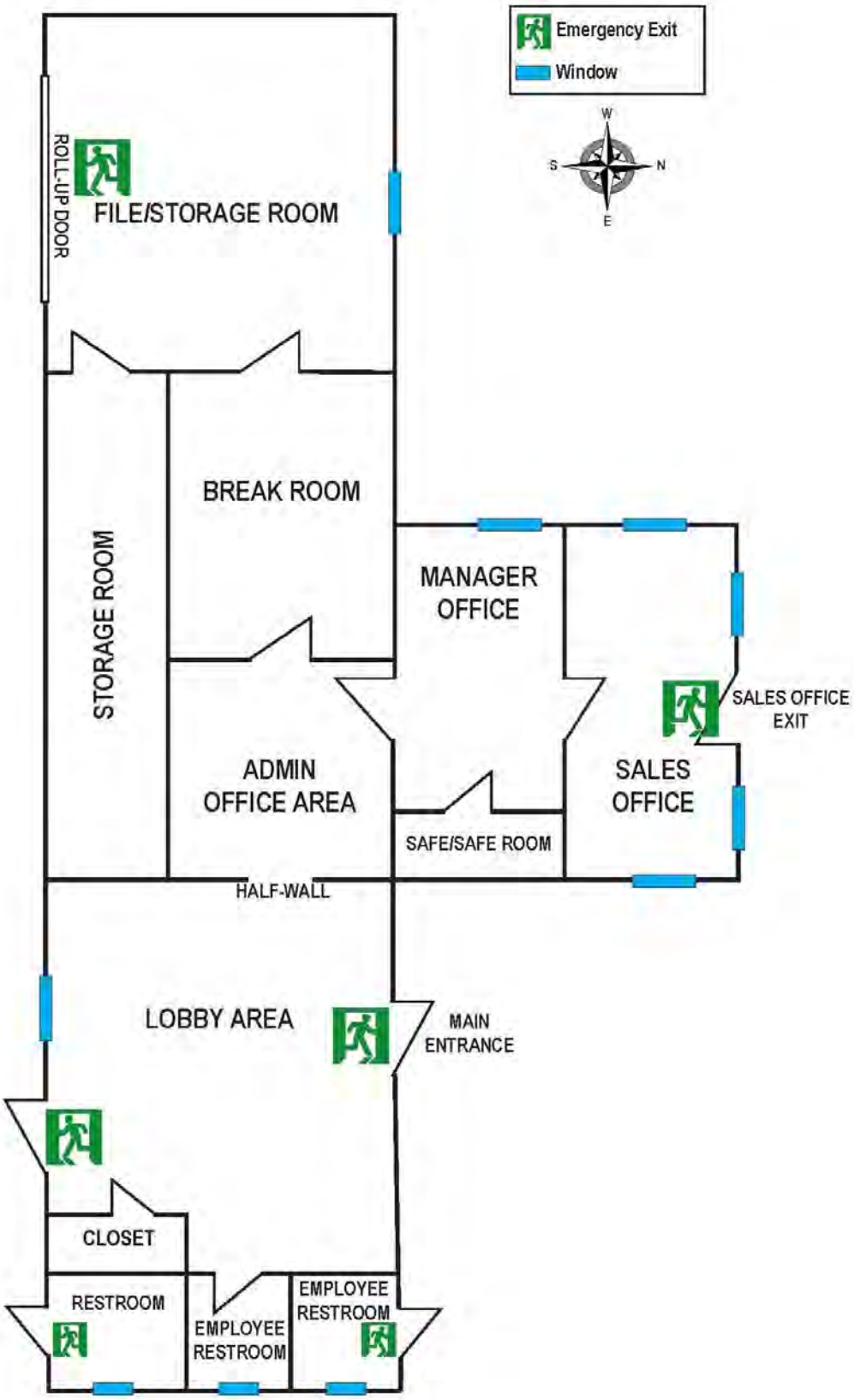
If there is an emergency in either site's shop location or the office building (Kern Site), the procedures for safe evacuation procedures are as follows:

1. Stay calm and act swiftly to evacuate the building through the nearest, safest exit.
2. If door ways are blocked, employees may break the nearest window to evacuate via that route, acting carefully to prevent injury from the glass.
3. If safe, turn off equipment, grab your keys and jacket, and close doors behind you to slow the spread of fire.
4. For office staff, grab original record books if possible to safely do so, or ensure the fireproof safe is secured.
5. Report to the main entrance of the cemetery site and call 911 for emergency assistance as urgently as possible.
6. Complete a headcount of all employees on site to ensure everyone is safely accounted for, and assess the need for any medical attention.
7. Report to emergency personnel as they arrive on site the nature of the emergency and any individuals needing medical attention.
8. Do not re-enter the building(s) until emergency personnel give the "all-clear."

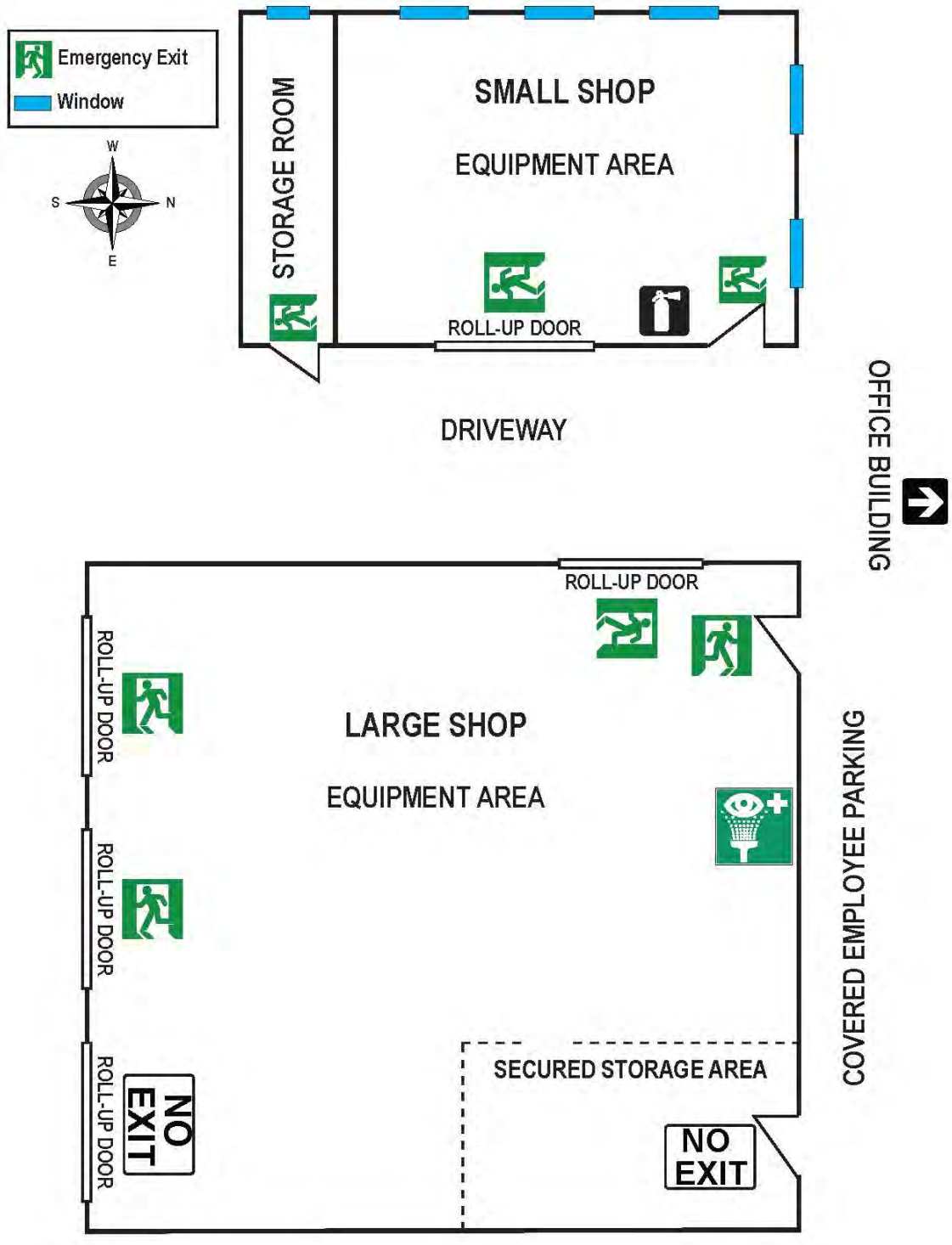
Building Evacuation Routes

Each building on at both cemetery locations has multiple evacuation or exit (egress) points. Floor plans are included on the following pages to determine the most efficient routes employees and members of the public can take to exit the building.

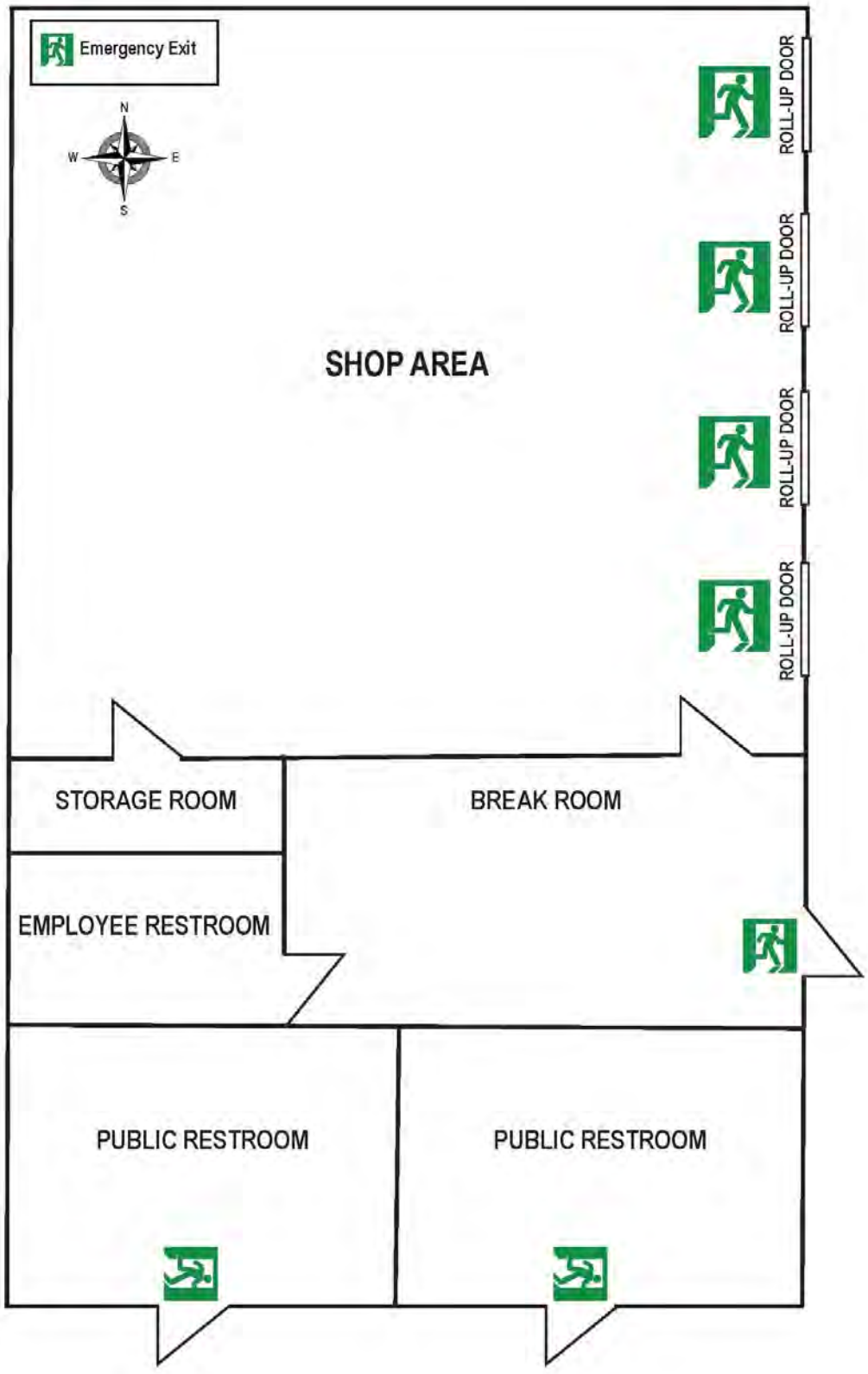
Kern Cemetery Location – Office Building



Kern Cemetery Location – Shop Buildings



North J Street Cemetery Location – Shop Building

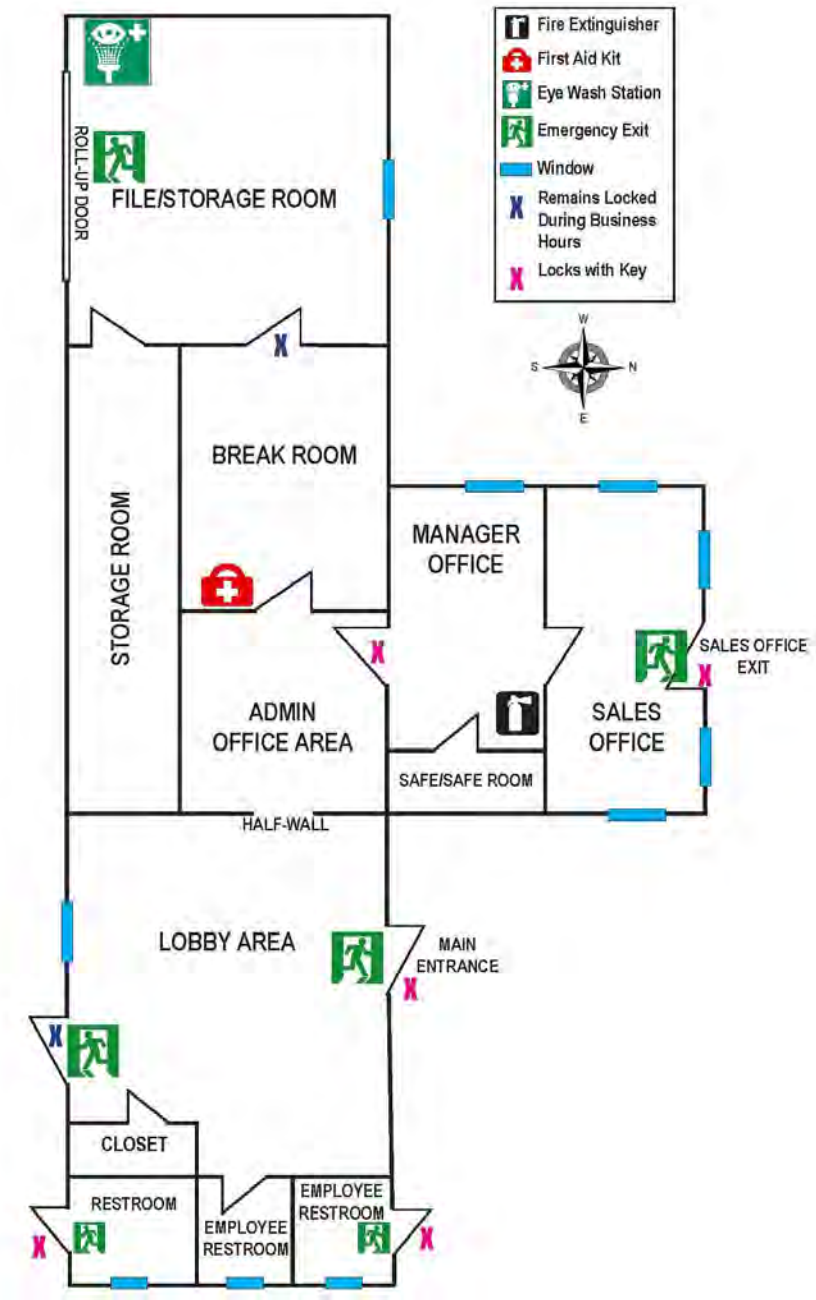


F. Shelter In Place

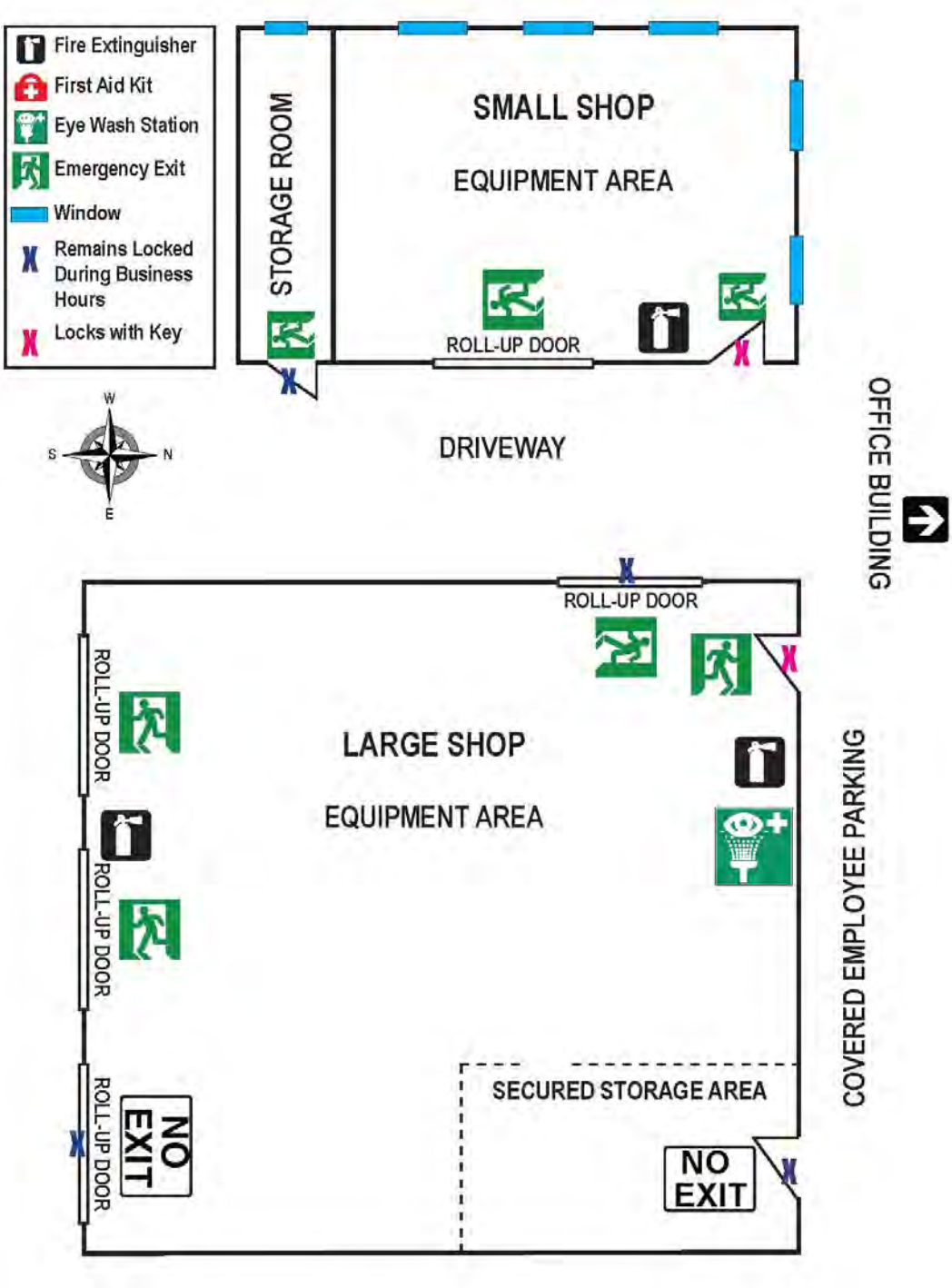
Shelter In Place is a temporary sheltering technique (i.e. up to several hours), utilized to limit personnel exposure in consideration of law enforcement scenarios that requires isolation within a building to maintain safety and preserve life against an **external threat** (e.g. "Active Assailant" or similar) during a potentially lethal threat situation.

The buildings at both cemetery locations have multiple entry (ingress) points. Please see the floor plans below and determine how to lock/secure those entry points.

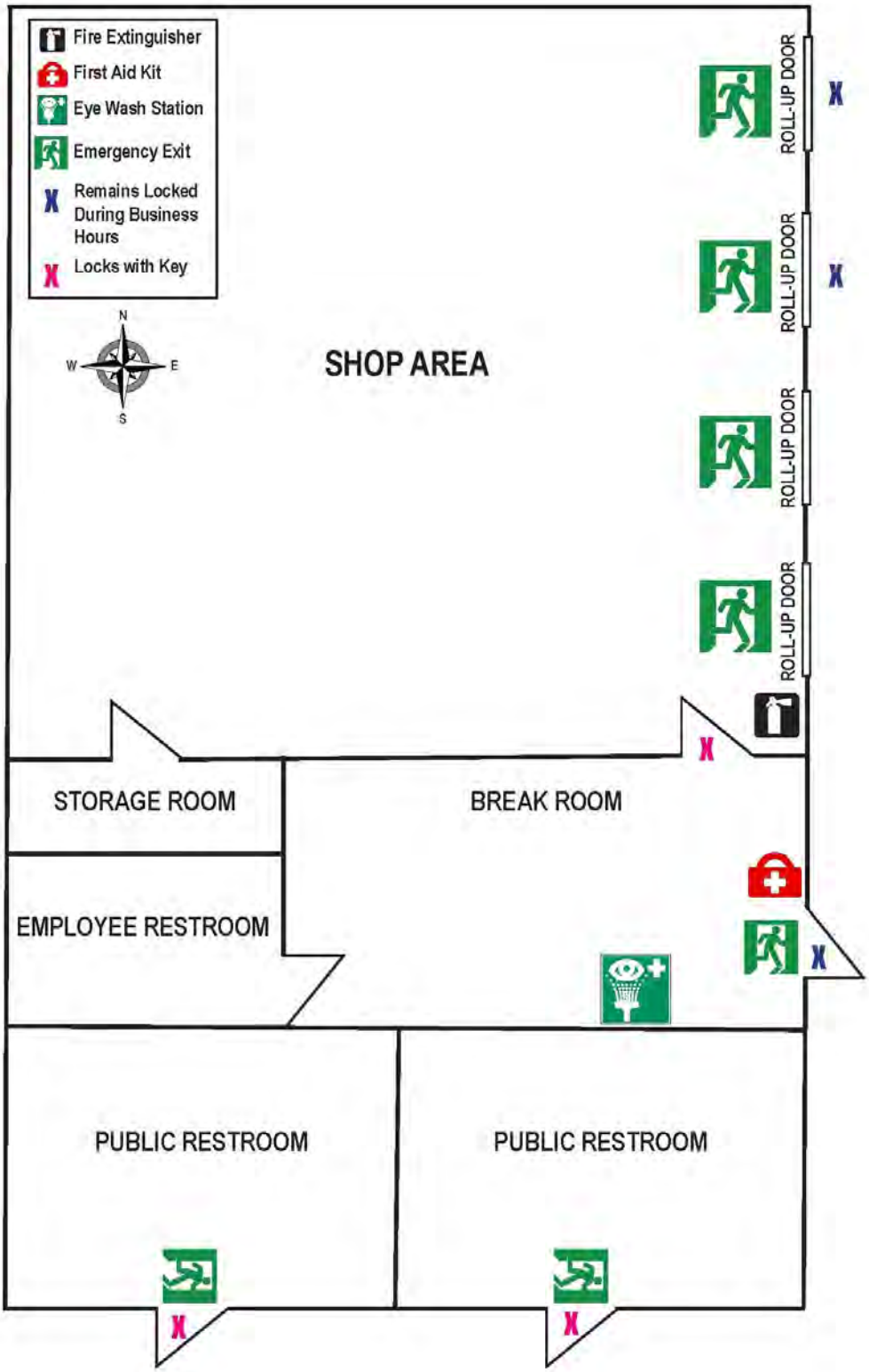
Kern Cemetery Location – Office Building



Kern Cemetery Location – Shop Buildings



North J Street Cemetery Location – Shop Building



Shelter-In-Place Protocol

In the event of a Shelter In Place situation:

- ☐ Emergency alarms will not be observed
- ☐ The first indicators of the need to activate the emergency lockout action plan will likely be an external disturbance (i.e. violence, gunshots)

DO NOT ACTIVATE FIRE ALARMS

- ☐ Remain calm
- ☐ If there is no immediate threat, lock/secure the entry point(s) closest to you
  - Locking doors may require security keys provided to all staff
  - Securing entry points may require barricading by pushing/stacking furniture against the opening
- ☐ Turn off all lights
- ☐ Help others secure entry points, if possible
- ☐ Be prepared to lockout inner offices
- ☐ Occupants should be seated below window level, toward the middle of a room away from windows and doors
- ☐ Turn off devices that emit sound
- ☐ Remain silent
- ☐ Stay out of view
- ☐ If possible, call 9-1-1 to report the event and/or provide intelligence
- ☐ Await “All-clear” notification from law enforcement agencies or Emergency Manager
- ☐ Refer to Appendix: Law Enforcement
- ☐ Present to your Safety Officer for roll call

G. Run-Hide-Fight Plan

The Run-Hide-Fight Plan is triggered by an active assailant, which is an individual actively engaged in killing or attempting to kill people in a confined and populated area. In most cases, active assailants use firearms or other weapons and there is no pattern or method to their selection of victims.

Active Run-Hide-Fight situations are unpredictable and evolve quickly. Your first warnings may be the sound of gunshots, verbal distress or yelling and not the sound of alarms or other alerts.

Typically, the immediate deployment of law enforcement is required to stop the assailant/shooter and mitigate harm to victims.

Because active assailant/shooter situations are often over within 10 to 15 minutes, before law enforcement arrives on the scene, individuals must be prepared both mentally and physically to deal with an active assailant situation.

Active Assailant Response

Quickly determine the most reasonable way to protect your own life. Remember that visitors are likely to follow the lead of employees and managers during an active assailant situation.

1. **Run**
   If there is an accessible escape path, attempt to evacuate the premises. Be sure to:
   - Have an escape route and plan in mind
   - Evacuate regardless of whether others agree to follow
   - Leave your belongings behind
   - Help others escape, if safe and if possible
   - Leave the vicinity and do not report to assembly points
   - Call 9-1-1, if safe and if possible, and stay on the line until otherwise instructed by the dispatcher
   - Prevent anyone, except law enforcement, from entering an area where the active assailant may be
   - Follow the instructions of any police officers
   - Keep your hands visible
   - Do not attempt to move wounded people
   - Follow designated check in procedures as soon as possible

2. **Hide**
   If evacuation is not possible, find a temporary place to hide where the active assailant is less likely to find you. Hiding places should allow an alternate exit and means of escape if and when needed. Your hiding place should:
   - Concealed: Be out of the active assailant's view
   - Cover: Provide protection if shots are fired in your direction (e.g. an office with a closed and locked door, filing cabinets)
   - Not trap you or restrict your options for movement (e.g. room with an alternate exit or window)

   To prevent an active assailant from entering your hiding place:
   - Lock the door
   - Blockade the door with heavy furniture

If the active assailant is nearby:

- Call 9-1-1, if safe and if possible, and stay on the line until otherwise instructed by the dispatcher
- Lock the door
- Silence your mobile phone's ringer
- Turn off any source of noise
- Hide behind large items (e.g. cabinets, desks)
- Remain quiet

If evacuation and hiding are not possible:

- Remain calm
- Dial 9-1-1, if possible, to alert police to the active assailant's location
- If you cannot speak, leave the line open to allow the dispatcher to listen

3. **Fight**
   As a last resort, and only when your life is in imminent danger, attempt to disrupt and/or incapacitate the active assailant by:
   - Acting as aggressively as possible against the active assailant
   - Improvising weapons and throwing items
   - Committing to aggressive actions

4. **Roll Call**
   The goal of Run-Hide-Fight Plan is to escape danger and protect your life. If you are able to exit the building safely. **Do not proceed to designated meeting points unless it is safe** to do so, and then follow your department procedure for roll call. If you are unable to exit the building and are able to find a safe and secure area, once it is safe to do so follow your department procedure for roll call.

H. Methods to Account for Tulare Public Cemetery District Employees

Employees have been instructed to meet at a designated location so that they can be accounted for on ~~the~~ ~~the~~the cemetery sites. To make it easy to remember under stressful situations, the meeting place for each cemetery site is the main entrance. Cemetery staff determined this would be the most ideal place at both sites because of distance from any buildings, and it would be the main entrance for the arrival of emergency personnel, and to make communicating the situation and any injuries more prompt and efficient.

A designated employee will be responsible for taking headcount of all employees. If that employee is not at the main entrance meet up spot, a secondary person will be designated to take the headcount. If it is determined that any employees are missing, the first responding emergency personnel will be notified upon their arrival. The emergency personnel will also be informed about the last approximate whereabouts of missing employees. **The emergency meeting location for the Kern Site and North Site will be the main entrance of each cemetery site.**

I. Means of Reporting Emergencies

When emergency personnel (law enforcement, fire, paramedics) arrive, it is our intention to notify all employees, members of the public, and any affected contractors about the crisis.

1. The first call will be made to 911 to request emergency personnel immediate response (fire, paramedics, law enforcement) the local fire department by using 911. Emergency telephone numbers are included in this plan.
2. If there are 10 employees/members of the public or fewer in the area, a human voice will be used to notify those on the job. If the area involving more than 10 employees/members of the public, airhorns or similar equipment will be used.
3. A designated employee will be responsible for notifications of the emergency, contacting 911 and taking the headcount at each cemetery site.

Emergency Response Team Responsible for Plan

As mentioned above, a designated member of the Grounds crew, along with a secondary contact will be responsible for notifications of the emergency, contacting 911 and accounting for all employees at each cemetery site.

1. Kern Site: Lydia Cervantes, Administrative Assistant; Bobby Jones, Groundskeeper, III
2. North Site: ~~Eddy Torrez, Groundskeeper II;~~ Jeremy Rumsey, Groundskeeper II; Ernest Murillo, Groundskeeper I
3. Both Sites: Trilby Barton, District Manager

For any questions or additional information regarding this EAP, please contact the District Manager~~ment Consultant~~.

J. Emergency Contacts

Kern Cemetery Location

- Site Address: 900 East Kern Ave, Tulare
- Telephone: 559-686-5544
- Emergency Telephone: 911
- Local Police Telephone (Direct): 559-684-4290
- Tulare Fire Department – Local Fire Telephone (Direct for Kern Cemetery): 559-684-4360
- LifeStar Ambulance – Local Paramedics Telephone (Direct): 559-688-2714
- Local Hospital Address: 869 N Cherry Ave, Tulare, CA
- Local Hospital Telephone: 559-688-0821
- Directions from Kern Cemetery to Nearest Hospital: Turn right on Kern Street, turn left on Blackstone, turn left on Merritt Ave. Hospital is on the left.

Directions from Kern Cemetery Location to Nearest Hospital

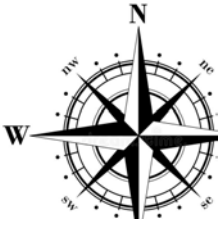


North J Street Cemetery Location

- Site Address: 4572 North J Street, Tulare
- Telephone: 559-686-5544
- Emergency Telephone: 911
- Local Police Telephone (Direct): 559-684-4290
- Tulare County Fire Department – Local Fire Telephone (Direct for North Cemetery): (559) 802-9800
- LifeStar Ambulance – Local Paramedics Telephone (Direct): 559-688-2714
- Local Hospital Address: 869 N Cherry Ave, Tulare, CA
- Local Hospital Telephone: 559-688-0821
- Directions from North Cemetery to Nearest Hospital: Drive south on J Street, turn left on Prosperity, turn right on Oaks Street, turn left on Merritt. Hospital is on the right.

Directions from North J Street Cemetery Location to Nearest Hospital





Appendix A: Personnel Roster

	Name	Title/Position	Location & Supervisor	Cell Number
☐	Lydia Cervantes	Administrative Assistant	Kern – District Manager	
☐	Phyllis Schneider	Office Manager	Kern – District Manager	
☐	James Corral	Grounds Supervisor	Kern – District Manager	
☐	Bobby Jones	Groundskeeper III	Kern – District Manager	
☐	Jeremy Rumsey	Groundskeeper II	North & Kern – District Manager	
☐	Ernest Murillo	Groundskeeper I	Kern & North – District Manager	
☐	Jose Ortiz	Groundskeeper I	North – District Manager	
☐	Luis De La Torre	On-Call Groundskeeper	North – District Manager	
☐	Eddy Torrez	Groundskeeper II	North – District Manager	
☐	Trilby Barton	District Manage~~ment Consultant~~r	Kern & North	
☐				
☐				

Appendix B: Other Emergency Scenarios

Tulare Public Cemetery District has created this Emergency Action Plan that addresses the most likely scenarios that may occur. However, as a matter of practical necessity, it is important to address other scenarios for which evacuation or "holding in place" may be needed. Tulare Public Cemetery District will address these scenarios here:

Earthquake

In the event of an earthquake, follow the recommendations of federal, state and local emergency management experts and other official preparedness organizations. These organizations believe the "Drop, Cover, and Hold On" plan is the appropriate action to reduce injury and death during earthquakes. This protocol is as follows:

- DROP to the ground (before the earthquake drops you)
- Take COVER by getting under a sturdy desk or table, and
- HOLD ON to it until the shaking stops

The main point of this protocol is to not try to move but to immediately protect oneself as best as possible. Staff will also be instructed on what not to do.

What NOT to Do:

- Do NOT get in a doorway. Doorways do not protect from flying or falling objects.
- Do NOT run outside. Trying to run outside during an earthquake is dangerous as glass, bricks or other building materials may be falling.

At the point that the earthquake has subsided, managers at the scene will ascertain if any injuries have been sustained by staff and will notify emergency services if necessary. Managers will also ascertain if any damage has been sustained to the building and will notify the District Manager ~~or Grounds Supervisor~~. If the damage is severe to the degree that it poses a risk to staff and the working environment, managers will notify the District Manager ~~and Grounds Supervisor~~.

Bomb Threat/Suspicious Package

Staff will utilize a Telephone Bomb Threat Procedures. This checklist thoroughly covers what to do if a bomb threat is received by phone, by handwritten note, by email, and/or if a suspicious package is seen. This checklist is attached to the Emergency Action Plan. If the threat is received by phone, **do not hang up**. Alert another employee and have them notify management.

If a threat is received in one or more of the above manner, staff will immediately notify the District Manager ~~or Grounds Supervisor~~. The manager will then forward this information to Law Enforcement and Risk Management and ask for assistance. Wait for further instructions.

If the alert is "Threat Received":

- Stay where you are
- Scan immediate area for suspicious object(s)

- If object is found, notify management or Law Enforcement and leave the area – DO NOT TOUCH!
- If no object is found wait for further instructions

If the alert is "Threat Verified":

- Listen for further instructions
  - Location of device and where to shelter in place, or:
  - Evacuate and proceed to designated assembly area
- DO NOT PANIC!

TELEPHONE BOMB THREAT PROCEDURES

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 the phone even if the caller does.
2. Try to keep the caller talking.
3. Listen carefully to the caller, show interest.
4. If possible, write a note to a co-worker to call the authorities, if not as soon as the caller hangs up immediately notify the authorities yourself but DO NOT HANG UP THE PHONE.
5. If your phone displays the callers information copy the information down as it appears.
6. Complete the Bomb Threat Checklist immediately. Write down as much detail as you can remember. Try and remember the exact words.

If a bomb threat is received by mail:

1. Call local law enforcement or Sheriff Department.
2. DO NOT DELETE the message.

Signs of a suspicious package:

- No return address
- Poorly handwritten
- Strange odor/sounds
- Incorrect titles
- Foreign postage
- Restrictive notes
- Incorrect titles
- Excessive postage
- Stains

If a bomb threat is received by handwritten note:

1. Call local law enforcement or Sheriff's department.
2. Handle note as least as possible.

DO NOT:

1. DO NOT Touch or move a suspicious package.
2. DO NOT Activate the fire alarm.
3. DO NOT Use two-way radios or cellular phone; radio signals have the potential to detonate a bomb.
4. DO NOT Evacuate the building until the authorities have arrived and evaluated the threat.

WHO TO CONTACT

- 911
- Dinuba Police Department (DPD) 591-5911
- Exeter Police Department (EPD) 592-3103
- Farmersville Police Department (FPD) 747-0321
- Lindsay Police Department (LPD) 562-2511
- Porterville Police Department (PPD) 782-7400
- Tulare County Sheriff (TCSO) 733-6218
- Tulare Police Department (TPD) 634-3454
- Visalia Police Department (VPD) 734-8116
- Woodlake Police Department (WPD) 564-3325

CHECKLIST FOR A BOMB THREAT

Date: _____ Time: _____

Time Caller Ended call: _____

Phone number where call was received: _____

Exact words of threat:

_____
_____
_____
_____
_____

Information about the caller:

Where is the caller located? (Background and noise level)
_____

Is the voice familiar? Who does it sound like?
_____

Estimated age:
_____

Other information:
_____

Other Information:

Caller's Voice
___ Accent
___ Angry
___ Calm
___ Clearing throat
___ Coughing
___ Cracking voice
___ Crying
___ Deep voice
___ Disguised
___ Distinct
___ Excited
___ Female
___ Laughter
___ Lisp
___ Loud
___ Male
___ Nasal
___ Normal
___ Rapid
___ Raspy
___ Slow
___ Slurred
___ Soft
___ Stutter

Background Sounds:
____ Animal Noises
____ Conversation
____ Factory Machinery
____ House Noises
____ Kitchen Noises
____ Local Noises
____ Long Distance
____ Music
____ Motor
____ Office Machinery
____ PA System
____ Static Noises
____ Street Noises
____ Other: _____

Threat Language:
____ Incoherent
____ Irrational
____ Message read
____ Profane
____ Message Read
____ Well-Spoken

Other Information: _____
_____
_____
_____

Based on the Department of Homeland Security Bomb Threat Checklist

http://emilms.fema.gov/is906/assets/ocso-bomb_threat_samepage-brochure.pdf

Civil Disturbance

If the disturbance is related to a strike or a protest, the District Manager ~~or Grounds Supervisor~~ will speak with staff on the following protocol:

- Do not engage the participants of the strike or protest.
- Do not accept any material or literature from participants of the disturbance.
- If participants of the disturbance do not allow you access to the building, do not try and force your way into the building. Return to your vehicle and contact your supervisor or other manager immediately.

Hazardous Materials

A hazardous material is any substance which may cause harm or present a health hazard. Safety Data Sheets (SDS) are available for all hazardous materials present in both cemetery locations. A list of these materials is located in a binder in both breakrooms, the District Manager's office, or by accessing the County SDS online account.

In the event of a hazardous materials emergency:

- Secure access to the area if safe to do so and evacuate the area
- Immediately call 911 and provide as much information as possible including SDS information
- Notify the District Manager ~~or Grounds Supervisor~~.

Power Outage

Management and members of the Emergency Response Team will be shown where the fuse boxes are to the building. In the event of a power outage, Southern California Edison will be contacted to determine when power may be restored. Staff will be notified as to the time estimate for power to be restored. The District Manager ~~or Grounds Supervisor~~ may then instruct staff to continue working "in the field" if possible.

Utility Shut Off

Management and members of the Emergency Response Team will be shown where utility shut offs to the office building, shop buildings, irrigation and well (J Street) are located. In the event of a flood, chemical release, natural disaster or other situation, utilities may need to be shut off for safety purposes. Emergency Managers will determine when to restore utilities.

- Gas shut off
- Electrical shut off
- Water shut off
- Ventilation system shut off

Appendix C: Law Enforcement Response

The objective of law enforcement is to stop the active assailant as soon as possible. Officers will proceed directly to the area in which the last shots were heard.

- Officers may wear regular patrol uniforms or external bulletproof vests, Kevlar helmets, and other tactical equipment, or may be in plain clothes with a visible badge
- Officers may be armed with rifles, shotguns, handguns
- Officers may use pepper spray or tear gas to control the situation
- Officers may shout commands, and may push individuals to the ground for their safety

How to react when law enforcement arrives:

- Remain clam, and follow the officers' instructions
- Put down any items in your hands
- Immediately raise hands and spread fingers
- Keep hands visible at all times
- Avoid making quick movements towards officers such as attempting to hold onto them for safety
- Avoid pointing, screaming, and/or yelling
- Do not ask officers for help when evacuating – just proceed in the direction from which officers are entering the premises

Information to provide law enforcement and/or 911 operator:

- Location of active assailant
- Number of active assailants
- Physical description of assailant(s)
- Number and types of weapons
- Number of potential victims at the locations

The first officers to arrive on scene will not stop to assist casualties. Additional officers will arrive to secure the scene along with medical personnel, and the officers will allow the medical personnel to respond as soon as it is safe to do so.

You may be called upon to assist the medical personnel if needed.

Once you are advised that the situation has been resolved and an "All Clear" is declared, proceed to an assembly point or safe location. You will likely be kept in that area by law enforcement until the situation is under control and all witnesses have been identified and questioned. Do not leave the assembly point or safe location until law enforcement has instructed you to do so.

Appendix D: Training and Drills

Each employee will be trained in their role in the Emergency Action Plan:

- Upon initial employment
- When the plan is updated or changed
- When appointed to the Emergency Response Team
- When given Rescue and Medical Duties
- If performing Critical Operations Duties

Emergency Evacuation Drills Will:

- Be conducted annually at each location
- Include testing of the designated alarm system(s)
- Be evaluated for effectiveness and improvements
- Have a training sign in sheet filled out, added to the IIPP binder and stored for a minimum of three years

Appendix E: Roll-Call Procedures

Tulare Public Cemetery District will implement the following plan for roll call during an emergency evacuation. Active assailant evacuations will not follow standard evacuation procedures and should follow active assailant protocols.

Roll Call Procedures

A clip board with the Roll Call List will be kept at the employee entrance and exit and secured from public access.

During an emergency the Emergency Manager at the location will collect the clipboard with the Roll Call List and report to the designated assembly point if safe to do so. During an active assailant scenario the designated location's Emergency Manager will collect the list and evacuate according the Active Assailant Protocol and alert emergency personnel about the Roll Call List when safe to do so.

The Emergency Response Team will be trained annually, when the plan is updated or changed and upon staffing changes.

Run Hide Fight Roll Call Procedures

During a Run Hide Fight situation employees will **not report to designated meeting areas.** Once it is safe to do so each employee will contact their designated supervisor. If they are unable to contact their designated supervisor, the employee will be assigned an alternate supervisor. Supervisors will report roll call to the location's designated Emergency Manager.

Appendix F: Emergency Manager Duties

In the event of an emergency the Emergency Manager (EM) will assist Law Enforcement and Emergency Responders during the event. The EM must have decision making authority for their department and must be a point of contact for their department personnel. It may be necessary to designate more than one EM in the event that an EM is out of the office during an event.

Emergency Manager Duties:

- Report to the designated meeting point for Emergency Managers or report to the lead Law Enforcement or Emergency Responder personnel
    - The meeting point will be different than the department Assembly Areas
    - Call local non-emergency phone line to locate the Emergency Command Post
    - Report to the Emergency Command Post
- Assist Law Enforcement or Emergency Responders with staffing questions
    - Number of employees
    - Employees unaccounted
    - Employee witness information
- Be the point of contact for Law Enforcement during a bomb threat and relay the instructions given to the Response Team
    - Evacuate to assembly area
    - Shelter in place
    - Location of where to shelter in place
- Be a point of contact for employees in the department
    - Response Team Roll Call designee will report to the EM as soon as possible
    - Will relay Law Enforcement or Emergency responder commands to the Response Team Evacuation Site Leader
- Assist Law Enforcement or Emergency Responders with the walk through of the building when requested.
- Evaluate building conditions to decide whether to evacuate or shelter in place during:
    - Power outage
    - Earthquake
    - Flood
    - Other weather-related occurrences

Illness and Injury Prevention Program

Drafted November 2025; Reviewed by GSRMA & Updated January 2026
Adopted by the Tulare Public Cemetery District Board of Trustees on January 27, 2026;
Updated and Reviewed by Tulare Public Cemetery District Board of Trustees on October 27, 2026

A. Program Goal and Outline

The goal of the Tulare Public Cemetery District (District) is to provide safe and healthful working conditions for all employees. Therefore, the District will maintain a safety and health program conforming to the best practices of agencies of this type. The District's safety and health program will include:

1. Providing mechanical and physical safeguards to the maximum extent possible.
2. Conducting a program of safety and health inspections to find and eliminate unsafe working conditions or practices, to control health hazards, and to comply fully with the safety and health standards and law for every job.
3. Training all employees in good safety and health practices.
4. Providing necessary personal protective equipment, and instructions for use and care.
5. Developing and enforcing safety and health rules, and requiring that employees cooperate with these rules as a condition of employment.
6. Investigating every accident promptly and thoroughly to determine its cause and correct the problem so it will not happen again.
7. Developing a system of employee recognition for outstanding safety service and/or performance.

B. Program Responsibility

Although the District recognizes that the responsibility for safety and health is shared, the District Manager shall be responsible and have full authority for implementing this policy and the District's Injury and Illness Prevention Program (IIPP).

1. The District accepts responsibility for leadership of the safety and health program, for its effectiveness and improvements, and for providing the safeguards required to ensure safe conditions.
2. Supervisory personnel are responsible for developing proper attitudes toward safety and health for themselves and in those they supervise, and for ensuring that all operations are performed with the utmost regard for the safety and health of all personnel involved, including themselves.
3. No employee will be required to work at a job he/she knows is not safe or healthful. Employees are responsible for wholehearted, genuine operation of all aspects of the safety and health program, including compliance with all rules and regulations, and for continuously practicing safety while performing their duties. Any employee found not practicing safety while performing their duties will be subject to appropriate discipline and/or additional training in safety practices.

C. Injury and Illness Records

The District's record keeping system for its Injury and Illness Prevention Program shall conform to Cal/OSHA standards. Records shall be used to measure and evaluate the success of said program.

1. A report shall be obtained on every injury or illness requiring medical treatment. (See also Section H, Code of Safe Practices)

2. Each injury or illness shall be recorded on the "Cal/OSHA Log of Work-Related Injuries and Illnesses," Cal/OSHA Form 300, according to its instructions, as well as the Cal/OSHA Form 200, “Cal/OSHA Log and Summary of Occupational Injuries and Illnesses.”
3. A supplementary record of the occupational injuries and illnesses shall be prepared on OSHA Form 5020, "Employer's Report of Injury or Illness," with the same information as in Section C.2, above.
4. Annually, the summary Cal/OSHA Form 200 shall be prepared and posted no later than February 1 in a place easily observable by employees. Said form shall remain posted until March 1.
5. All records specified in this section shall be maintained in the District's files for a minimum of five years after their preparation.

D. Documentation of Activities

Records shall be maintained of steps taken to establish and maintain the District's Injury and Illness Prevention Program. They shall include:

1. Records of scheduled and periodic inspections as required by Cal/OSHA [California Code of Regulations, Title 8, Chapter 4] to identify unsafe conditions and work practices. The documentation must include the name of the person(s) conducting the inspection, the unsafe conditions and work practices identified, and the action taken to correct the unsafe conditions and work practices. The records are to be maintained for at least three (3) years.
2. Documentation of safety and health training required by Cal/OSHA [California Code of Regulations, Title 8, Chapter 4] for each employee. The documentation must specifically include employee name or other identifier, training dates, type(s) of training and the name of the training provider. These records must also be kept for at least three years.

E. Program Communication System

Readily understandable communication shall be maintained with all affected employees on matters relating to occupational safety and health, including provisions designed to encourage employees to inform the District of hazards at the worksite without fear of reprisal. Communications with employees shall include meetings, training programs, posted written information, and a system of anonymous notification by employees about hazards.

1. Written communications to employees shall be in a language they can understand. If an employee cannot read in any language, said communication shall be made orally in a language he/she can readily understand.
2. The District's Code of Safe Practices, below, shall be posted at a conspicuous location in the District's maintenance office, and shall be provided to each supervisory employee who shall keep it readily available.
3. Periodic meetings (at least one per quarter) of supervisory employees shall be held under the direction of the District Manager for the discussion of safety problems and accidents that have occurred. Documentation of these meetings shall be maintained for three years.
4. Supervisory employees shall conduct "tailgate" safety meetings, or equivalent, with their crew(s) no less than twice per month to emphasize safety. Documentation of these meetings shall be maintained for three years.
5. General employee meetings shall be conducted (at least one per quarter) at which safety is freely and openly discussed by those present. Such meetings should be regular, scheduled, and announced to all employees so that maximum employee attendance can be achieved. Documentation of these meeting shall be maintained for three years. Safety discussions at these meetings should concentrate on:
    i. Occupational accident and injury history within the District, with possible comparisons to other similar agencies.
    ii. Feedback from employees.
    iii. Guest speakers from the District's workers' compensation insurance carrier or other agencies concerned with safety.
    iv. Brief audio-visual materials that relate to the District's operations.

6. Training programs shall be conducted when new equipment, machinery or tools are purchased. Employees shall be instructed in the safe operation of said equipment, machinery or tools. Documentation of training programs shall be maintained for three years.
    i. New employees shall be trained by their supervisor in the safe operation of the equipment, machinery and tools with which they will be working prior to being allowed to work independently. Documentation of new employee training shall be maintained for three years.
7. Posters and bulletins relating to and encouraging safe and healthy practices shall be posted on a rotational basis at a conspicuous location in the District's breakroom(s).
8. News articles and publications devoted to safety shall be distributed to employees when applicable. This IIPP policy shall also be distributed to all employees upon its adoption, to all new employees at the time of their hiring, and annually thereafter.
9. A safety suggestion box shall be maintained where employees, anonymously if desired, can communicate their concerns to the District Manager.

F. Hazard Assessment and Control

Periodic safety inspections shall be conducted to identify existing hazards in the workplace, or conditions, equipment and procedures that could be potentially hazardous. The inspections shall be conducted by personnel who, through experience or training, are able to identify actual and potential hazards and who understand safe work practices.

1. Safety inspectors will observe if safe work practices are being followed and will ensure that unsafe conditions or procedures are identified and corrected properly.
2. Safety inspections will be conducted at least annually. The frequency of the inspections will depend on the operations involved, the magnitude of the hazards, the proficiency of employees, changes in equipment or work processes, and the history of workplace injuries and illnesses.
3. A written assessment shall be prepared after said inspections which will document identified hazards and prescribe procedures for the elimination of same, and measures that can be taken to prevent their recurrence.
4. The District Manager will review written inspection reports and/or assessments and will assist in prioritizing actions and verify completion of previous corrective actions. He/she shall also review the overall inspection program to determine trends.

G. Accident Investigation

All accidents shall be thoroughly and properly investigated by the District Manager and Grounds Supervisor, with the primary focus of understanding why the accident or near-miss occurred and what actions can be taken to preclude recurrence. A written report of said investigation shall be prepared which adequately identifies the cause(s) of the accident or near-miss occurrence.

1. The investigation must obtain all the facts surrounding the occurrence: what caused the situation to occur; who was involved; was/were the employee(s) qualified to perform the functions involved in the accident or near-miss; were they properly trained; were proper operating procedures established for the task involved; were procedures followed, and if not, why not; where else this or a similar situation might exist, and how it can be corrected.
2. The accident investigator must determine which aspects of the operation or process require additional attention (what type of constructive action can eliminate the cause(s) of the accident or near-miss).
3. Actions already taken to reduce or eliminate the exposures being investigated should be noted, along with those remaining to be addressed.
4. Any interim or temporary precautions should also be noted. Any pending corrective action and reason for delaying its implementation should be identified.

5. Corrective action should be identified in terms of not only how it will prevent a recurrence of the accident or near-miss, but also how it will improve the overall operation. The solution should be a means of achieving not only accident control, but also total operation control.

H. Code of Safe Practices

General

1. All employees shall follow these safe practices rules, render every possible aid to safe operations, and report all unsafe conditions or practices to the ~~Grounds Supervisor and~~ District Manager.
2. Supervising employees shall insist on employees observing and obeying every rule, regulation, and order as is necessary to the safe conduct of the work, and shall take such action as necessary to obtain observance.
3. Anyone known to be under the influence of drugs or intoxicating substances which impair the employee's ability to safely perform the assigned duties shall not be allowed on the job while in that condition, and will be subject to the discipline outlined in the Drug & Alcohol Testing Policy described in the District's Employee Handbook.
4. Horseplay, scuffling, and other acts which tend to have an adverse influence on the safety or well-being of the employees shall be prohibited.
5. Work shall be well planned and supervised to prevent injuries in the handling of materials and in working together with equipment.
6. No one shall knowingly be permitted or required to work while the employee's ability or alertness is so impaired by fatigue, illness, or other causes that it might unnecessarily expose the employee or others to injury.
7. Employees shall not enter manholes, vaults, graves or other similar places that receive little ventilation, unless it has been determined that it is safe to enter.
8. Employees shall be instructed to ensure that all guards and other protective devices are in proper places and adjusted, and shall report deficiencies promptly to the Grounds Supervisor or District Manager.
9. Crowding or pushing when boarding or leaving any vehicle or other conveyance shall be prohibited.
10. Workers shall not handle or tamper with any electrical equipment, machinery, or air or water lines in a manner not within the scope of their duties, unless they have received instructions from the Grounds Supervisor.
11. All injuries shall be reported promptly to the ~~Grounds Supervisor or~~ District Manager so that arrangements can be made for medical or first aid treatment.
12. When lifting heavy objects, the large muscles of the leg instead of the smaller muscles of the back shall be used.
13. Materials, tools, or other objects shall not be thrown from buildings or structures or graves until proper precautions are taken to protect others from the falling objects.
14. Employees shall cleanse thoroughly after handling hazardous or unhealthy substances, and follow special instructions from authorized sources.
15. Work shall be so arranged that employees are able to face a ladder and use both hands while climbing.
16. Gasoline shall not be used for cleaning purposes.
17. No burning, welding, or other source of ignition shall be applied to any enclosed tank, vault or other vessel, even if there are some openings, until it has first been determined that no possibility of explosion exists, and authority for the work is obtained from the ~~Grounds Supervisor or~~ District Manager.
18. Any damage to grave shoring or other supporting structures shall be immediately reported to the ~~Grounds Supervisor or~~ District Manager.

Use of Tools and Equipment

19. All tools and equipment shall be maintained in good condition.
20. Damaged tools or equipment shall be removed from service and tagged "DEFECTIVE."

21. Pipe or Stillson wrenches shall not be used as substitute for other wrenches.
22. Only appropriate tools shall be used for the job.
23. Wrenches shall not be altered by the addition of handle-extensions or "cheaters."
24. Files shall be equipped with handles and not used to punch or pry.
25. Screwdrivers shall not be used as chisels.
26. Wheelbarrows shall not be used with handles in an upright position.
27. Portable electric tools shall not be lifted or lowered by means of the power cord. Ropes shall be used for this purpose.
28. In locations where the use of a portable power tool is difficult, the tool shall be supported by means of a rope or similar support of adequate strength.

Machinery and Vehicles

29. Only authorized persons who have been properly trained shall operate machinery or equipment.
30. Loose or frayed clothing, or long hair, dangling ties, finger rings, etc., shall not be worn around moving machinery or other sources of entanglement.
31. Machinery shall not be serviced, repaired or adjusted while in operation, nor shall oiling of moving parts be attempted, except on equipment that is designed or fitted with safeguards to protect the person performing the work.
32. Where appropriate, lock-out procedures shall be used.
33. Employees shall not work under vehicles supported by jacks or chain hoists, without protective blocking that will prevent injury if jacks or hoists should fail.
34. Air hoses shall not be disconnected at compressors until hose line has been bled.
35. All excavations shall be visually inspected before backfilling, to ensure that it is safe to backfill.
36. Excavating equipment shall not be operated if the safety of other employees or members of the public is jeopardized.
37. Tractors, backhoes and other similar equipment shall not operate where there is possibility of overturning in dangerous areas.

I. Health & Safety Training

Employee health and safety training on general and job-specific safety and health practices shall be provided as follows:

- New employees shall be provided general health and safety training upon hire including but not limited to: IIPP, District Code of Safe Practices, Workplace Violence Prevention Plan (WVPP), Emergency Action Plan (EAP), Driving Standards and Vehicle Accident Procedures training video, office ergonomics and reporting workplace injuries process.
- Job-specific training prior to commencing work duties, including safe operations of equipment
- When employee is assigned to a new task or job for which training has not previously been received
- When new substances, work processes and procedures or equipment are introduced into the workplace that present a new hazard
- When the District learns of a new or previously unrecognized hazard

All Grounds employees, whether supervisor or groundskeeper, will be trained on the health and safety hazards they may be ~~exposed~~exposed to. No employee shall be permitted to perform a task without being properly trained on the hazards associated with, and the proper use or operation of, any equipment needed to complete the task.

Safety training may be provided using any of the following methods:

- "Tailgate" Safety meeting (a minimum of two safety meetings per month)
- Employee coaching/mentorship
- Webinar
- Online or DVD training
- Staff meetings

J. Employee Access to Program

All employees will have access to the District's IIPP. A written copy of the IIPP will be located in the District's main office in the bookshelf of the ~~Grounds work station~~break room at the Kern Cemetery location and in the computer room of the North Cemetery location for employees to view at their convenience.

K. Recordkeeping & Reviews

Recordkeeping

Records that document the implementation of this IIPP shall be maintained by the District Manager. Records shall be maintained in the District Manager's office for at least the period indicated below:

1. Written IIPP – Indefinitely
2. Inspection forms – 3 years
3. Investigation reports – 3 years
4. Employee Training sign-in sheets – 3 years
5. Records related to employee communication and enforcement – 3 years
    i. Safety meeting sign-in sheets
    ii. Employee suggestions/questions/responses
6. Medical and employee exposure records subject to access standard – Employment plus 30 years
7. Cal/OSHA 300/300A Logs – 5 years plus current year

Plan Reviews

The IIPP is considered a "living document" that requires regular reviews, annual updates, and workplace changes or incident investigations. The Tulare Public Cemetery District's Safety Committee will conduct an annual review of the plan in January of each year to ensure safety procedures, responsibilities and contact information are up to date, and to identify and incorporate any workplace changes or address results of incidents investigations. If the need for a change arises prior to the January review, the Safety Committee may make any updates when necessary.

An annual training will be conducted prior to March 1 of each year for ALL employees to discuss any changes made to the IIPP and to review the IIPP as a whole. The annual training will be documented with a sign-in sheet and kept on file with IIPP records.

Tulare Public Cemetery District

Workplace Violence Prevention Plan

Drafted November 2025; Approved January 2026; Updated October 2026

Plan Updated November 2025; Updated Plan Reviewed by GSRMA & Updated January 2026;
Adopted by Tulare Public Cemetery District Board of Trustees on January 27, 2026
Updated and Reviewed by Tulare Public Cemetery Board of Trustees on October 27, 2026

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A. Commitment to Preventing and Addressing Workplace Violence

We are committed to creating a positive, caring, and safe work environment, which includes taking initiative to maintain a secure work environment and practice safe work habits. This Workplace Violence Prevention Plan (WVPP or Plan) of Tulare Public Cemetery District (District) is designed with our District values in mind while complying with the applicable law, and operates along other District policies relating to workplace safety including our Emergency Action Plan.

The purpose of the WVPP is to protect employees, as well as visitors, or customers from any threat of violence or workplace violence, and effectively address such incidents should they arise. The Plan does not apply to employees who are teleworking from a location of their choice, which is not under the District's control.

You should be familiar with the District's WVPP and your role in preventing and addressing incidents of workplace violence. If you have questions, your supervisor, the WVPP Administrator, and the management team are all available to answer them.

Thank you for all you do to create and foster a safe and secure work environment.

B. Important Definitions

"Emergency" means unanticipated circumstances that can be life threatening or pose a risk of significant injuries to employees or other persons.

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

"Workplace violence" means any act of violence or threat of violence that occurs in a place of employment. "Workplace violence" includes, but is not limited to, the following:

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

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

There are four types of workplace violence:

1. ***Type 1 Violence***: workplace violence committed by a person who has no legitimate business at the worksite and includes violent acts by anyone who enters the workplace or approaches workers with the intent to commit a crime.
2. ***Type 2 Violence:*** workplace violence directed at employees by customers, clients, patients, students, inmates, or visitors.

3. ***Type 3 Violence:*** workplace violence against an employee by a present or former employee, supervisor, or manager.
4. ***Type 4 Violence:*** workplace violence committed in the workplace by a person who does not work there but has or is known to have had a personal relationship with an employee.

C. Responsibility for Implementing the Plan

The WVPP summarizes individual responsibilities, how we strive to safeguard employees, visitors and customers while ensuring continuity of operations, and specific tools and procedures for doing so. While compliance is critical, our overarching goal is worker safety.

The WVPP Administrator identified below and has overall authority and responsibility for implementation of the provisions of the WVPP. The WVPP Administrator can be reached at the contact information below. The WVPP Administrator, or designee, works closely with management in the formation and support of the WVPP Review Group, which will be responsible for addressing workplace violence issues at the individual facility level. The additional roles work closely with the WVPP Administrator in the formation and implementation of the WVPP:

Function	Name/Title	Contact Information
WVPP Administrator	Trilby Barton	Work Pphone: 559-686-5544 Cell Pphone: 559-740-8006 Email: manager@tularecemetery.net
HR Coordinator	Trilby Barton	Work Pphone: 559-686-5544 Cell Pphone: 559-740-8006 Email: manager@tularecemetery.net
Local Facility Manager or Supervisor	Trilby Barton	Work Pphone: 559-686-5544 Cell Pphone: 559-740-8006 Email: manager@tularecemetery.net
Grounds Supervisor	James Corral	Work Pphone: 559-686-5544 Cell Pphone: 559-631-6238
Office Admin	Lydia Cervantes	Work Pphone: 559-686-5544

WVPP Administrator. The WVPP Administrator will ensure that:

1. The Plan is complete and updated as required.
2. The Plan is available to all employees.
3. Oversee workplace violence hazard assessment and inspections, as appropriate, to evaluate the work tasks of all employees to determine the presence of hazards, conditions, operations, and other situations with might place workers at risk of workplace violence incident in the workplace.
4. Review previous incidents of violence or threats of violence in the workplace and other records identifying patterns that may indicate causes and severity of incidents and identify changes necessary to correct hazards.

HR Coordinator and Facility Manager. The HR Coordinator and Facility Manager will:

1. Implement the provisions of the Plan with assistance from the management/supervisor team, Safety Committee, and all employees.
2. Ensure all managers and supervisors are trained in their individual safety responsibilities related to the Plan.

Managers and Supervisors. Managers and Supervisors must:

1. Inform team members of Plan and enforce compliance;
2. Ensure employees know specific procedures for dealing with workplace threats and emergencies, and how to contact police, fire, and other safety and security officials;
3. Ensure employees with special needs are aware of emergency evacuation procedures and have assistance (as necessary) regarding emergency evacuation situations;
4. Respond to potential threats and escalating situations by utilizing proper resources from local law enforcement and medical services, Human Resources staff, and the Employee Assistance Program (EAP);
5. Coordinate policies, plans, and procedures with state agencies as applicable;
6. Promote positive behavior and lead by example through modeling appropriate behavior and by treating employees and customers with respect and dignity;
7. Contribute to creating a workplace where established standards of conduct are clear, communicated, and consistently enforced, and where corrective action, including discipline, is used fairly to deal with instances of unacceptable behavior;
8. Treat all reports of violence or threats of violence seriously;
9. Understand that individuals participating in or tolerating workplace violence or retaliation are subject to discipline up to and including termination;
10. Report all potential violence or acts of violence regardless of individual or behaviors witnessed on agency workplace violence to Human Resources,
    a. Complete the Incident Report Log form after every incident of workplace violence.

D. Employee Access

A copy of this WVPP is also available and accessible to employees in a binder located in the break room of the Kern Cemetery and North Cemetery locations. It is also available electronically on a shared district hard drive ~~or via QR code made available to all staff~~. In addition, the WVPP is available to employees, and the Division of Occupational Safety and Health upon request to the WVPP Administrator (Trilby Barton) or ~~Phyllis Schneider~~Lydia Cervantes.

E. Involvement of Employees

The District encourages active involvement of employees in developing and implementing the Plan. The District's WVPP Review Group is responsible for reviewing the WVPP and overseeing the development and implementation of that Plan. The WVPP Review Group, led by the WVPP Administrator or designee,

includes one or more non-management employees or otherwise seeks input from employees. The WVPP Review Group oversees the identification, evaluation and correction of workplace violence hazards, design and implementation of training, and the reporting and investigation of workplace violence incidents. To participate in the WVPP Review Group, please contact the WVPP Administrator.

F. Accepting and Responding to Reports of Workplace Violence

Employees are required to report threats or acts of workplace violence to a manager or supervisor, or the WVPP Administrator. Anonymous reporting is accommodated by contacting Human Resources. Employees may also anonymously notify management of safety and health concerns at any time by working through the WVPP Review Group or contacting the WVPP Administrator. In addition, the District may provide a suggestion box to anonymously report potential threats of violence. The District will take appropriate measures in response. See incident response procedures below.

The District strictly prohibits retaliation against any employee for making a report of workplace violence.

G. Compliance

Managers and supervisors are responsible for ensuring that all safety and health policies and procedures related to workplace violence prevention are clearly communicated and understood by all employees. **All employees** are responsible for using safe work practices, for following all directives, policies, and procedures for assisting in maintaining a safe work environment, and, for promoting safety whenever and wherever possible.

Managers and supervisors are trained, and retrained as appropriate, on the WVPP. Managers and supervisors are expected to enforce the rules and expectations fairly and uniformly and without any retaliation. The following is our system of ensuring that all workers comply with the work practices designed to prevent against workplace violence incidents, ensure they are properly addressed when they occur, and maintain a safe work environment:

1. Inform employees, supervisors and managers of the provisions of our WVPP;
2. Train employees, supervisors, and managers of the provisions of the WVPP when the Plan is first established, and annually thereafter;
3. Train all new employees and all employees given a new job assignment of the provisions of the WVPP when they are hired;
4. Provide training to instruct employees on general safe and healthy work practices and providing specific instruction with respect to hazards specific to each employee's job assignment;
5. Evaluate the performance of all employees in complying with our establishment's workplace security measures;
6. Identify and evaluate workplace hazards, including scheduling periodic inspections to identify unsafe conditions and work practices and promptly correcting any unsafe or unhealthy conditions or work practices;
7. Recognize employees who perform safe and healthful work practices. This recognition is accomplished in a variety of ways that may vary over time. Examples of typical recognition include public and/or published commendations, Safety "Star" Awards, "safety bucks" spot awards that are redeemable for prizes, community-wide contests, and through the appraisal process;

8. Provide retraining to employees who do not meet expectations relating to the WVPP;
9. Provide a system for communicating with employees about occupational health and safety matters, including a means that employees can use to inform the employer of hazards at the worksite without fear of reprisal;
10. Provide special precautions for employees exposed to external workplace violence; and
11. Discipline employees for failure to adhere to the WVPP.

H. Communication

The District recognizes that to maintain a safe and secure work environment it must maintain communication on matters of workplace violence with all employees, including the employees of other employers that work in the facility. The following is our system of communication, designed to facilitate a continuous flow of two-way (management, supervisor, and employees) safety, health, and security information in a form that is readily understandable to and between all affected site personnel, and maintained free from fear of reprisal:

1. Workplace-specific training on the WVPP;
2. Effective documentation and communication of information regarding conditions that increase the potential for workplace violence to other workers and between shifts and locations;
3. Posted and distributed safety information, including current safety news and activities, safety reading materials, using a variety of means such as signs, posters, memos, flyers, paycheck inserts, and bulletin boards for easy access to information;
4. A system for reporting workplace violence incidents and concerns. Violent incidents, threats, or other concerns related to workplace violence should be directly reported to a manager or supervisor, or the WVPP Administrator. Anonymous reporting is accommodated by contacting Human Resources. Employees may also anonymously notify management of safety and health concerns at any time by working through the Safety Committee. **Retaliation against any employee for reporting an incident, threat, or other workplace violence concern is strictly prohibited.**
5. A system for protecting employees who report threats from retaliation by the person making the threats of violence. Employees who report incidents of workplace violence will be protected from the person making the threats by District immediately taking the appropriate actions such as removing the person, making the threats, from the work area until the situation is resolved. For serious threats or acts of violence, the local police will be called.

I. Procedure for Reporting Threats or Acts of Workplace Violence

An important part of the communication component of workplace violence prevention is reporting any threats or acts of workplace violence. Employees are required to report such incidents and should do so in accordance with the following:

1. Immediately report all violent incidents, threats or other workplace violence concerns to your supervisor or manager, or the manager on duty, without fear of reprisal.

2. The manager, supervisor or manager on duty will contact law enforcement, if appropriate, and coordinate with law enforcement on the reporting and investigation in the workplace violence incident.

3. The supervisor or manager will complete an Incident Report Log (Appendix A) and give it to the WVPP Administrator. The WVPP Administrator will inform the reporting employee of the results of the investigation and any resulting corrective actions taken.

J. Incident Response

The WVPP Administrator is responsible for developing procedures for responding to actual or potential workplace violence emergencies including effective means to alert employees of the presence, location, and nature of workplace violence emergencies, evacuation or sheltering plans as appropriate and feasible, and how to communicate with and obtain help from staff assigned to respond to workplace violence emergencies, security personnel or law enforcement, as applicable.

The District will follow the following procedures when responding to actual or potential workplace violence emergencies, including, but not limited to, all of the following:

1. Alerting employees of the presence, location, and nature of workplace violence emergencies, and communication practices during such an event;
2. Enforcing evacuation or sheltering plans that are appropriate and feasible for the worksite;
3. Communication about how to obtain help from staff assigned to respond to workplace violence emergencies, if any, security personnel, if any, and law enforcement;

The District's procedures when responding to a violent act where one or more persons are injured include:

1. Anyone involved in a violent attack or who witnesses an attack resulting in an injury that requires more than first aid will contact emergency services.
2. The injured will be transported to medical care facilities.
3. The incident will be reported to police and other authorities as required by law.
4. The area where the violent actions occurred will be secured to protect evidence and minimize any disturbance during the post-incident response process.
5. A **Violent Incident Log** (Appendix A) will be prepared.
6. Injured persons, witnesses to the incident, and other affected employees will be offered psychological assistance and counseling to reduce trauma and stress.

Active Shooter Incidents

An Active Shooter is an individual who is actively engaged in killing or attempting to kill people in a confined and populated area. Typically, there is no discernable pattern or method to the shooter's selection of victims. Active shooter situations are unpredictable by nature and typically evolve quickly; therefore, situational awareness and preparedness are key in safely responding to an active shooter situation. If an active shooter is detected in your vicinity, law enforcement and the federal government recommend that you take the following actions immediately:

1. Remember: **RUN – HIDE – FIGHT**.

2. If it is safe to do so, the first course of action that should be taken is to **RUN**. Be aware of the **nearest exits point at the facility**.
    a. Run out of the facility or away from the area under attack.
    b. Leave personal belongings behind.
    c. Encourage others to exit the facility with you, but once safely away from the area, do not run back into the facility under any circumstances.
    d. Remain in the designated location until law enforcement arrives; unless it becomes unsafe and you have to leave the area for a safer location.
    e. Designate a team member to call 911 as soon as you are in a safe location far away from the attack. The team member should be prepared to give the address of the facility, the approximate number of suspects and the approximate number of occupants, and any other pertinent information about the attack, if known.
3. If running is not a safe option, or the shooter(s) is blocking the facility exits, you should **HIDE** in as safe a place as possible. If you are in an **administrative office or training room**, stay. If you are on the exposed floor of the facility, quickly move towards the nearest office or training room. Once inside the room, take the following steps:
    a. Encourage others that may be in the hallways or exposed floor area to quickly enter the sheltered room, using gestures and eye contact. **Do not draw attention to the area by shouting or making noise**.
    b. Once people in the immediate vicinity are inside the sheltered room, do not exit the room to retrieve other team members or open the door for any reason until given the all clear by recognizable law enforcement officials.
    c. Do not exit the room, even if the fire alarm is triggered, as this may have been done by the shooter to encourage evacuation.
    d. Lock the doors to the room and close any blinds/shades.
    e. Turn off the lights in the shelter room and stay out of view of hallways/windows.
    f. Silence electronics and remain quiet.
    g. Barricade the door with any available furniture or equipment and take shelter behind any available cover; the goal is to put as many obstacles between yourself and the shooter as possible.
    h. Identify and retrieve items that may be used as improvised weapons.
    i. Remain in place until given the all clear by identifiable law enforcement.
4. If running and/or hiding is not an option, and you are confronted with the shooter, <u>as a last</u> <u>resort</u> you should **FIGHT**.
    a. Don't seek out the shooter for a confrontation.
    b. Don't fight unless you must (e.g., to save your life or another's life).

c. If you don't have a weapon, look for an improvised weapon (e.g., scissors, heavy lamp, fire extinguisher, chair, letter opener, keys, chemical sprays, etc.).

d. If you are with others and have the time, quickly plan a simple coordinated attack.

e. Be extremely aggressive and try to incapacitate the aggressor as quickly as possible.

f. Go for vulnerable areas (e.g., eyes, groin, throat, knees) and don't stop until the shooter is down and out.

    a. If the shooter is subdued or injured, your focus should then be on exiting the facility as swiftly as possible.

5. Cooperate and do not interfere with the first responders on the scene (police officers, EMT technicians, firefighters, etc.)

   When law enforcement arrives:

   a. Put your hands up and keep them up; the police won't know the good guys from the bad guys.

   b. Accept the fact that you're not in control; listen, don't argue with the police, and obey orders as quickly as you can.

   c. Stay calm; the police will have guns, they'll be yelling, and they'll be acting aggressively.

   d. Provide any information you can but stop talking if the police are too busy to listen to you.

   e. Stay where they tell you to go, until they say it's okay to leave.

   Once the event is over, supervisors/managers need to remain in the designated safe locations and assist management with accounting for all team members, and delivering information to employees.

Threats of Violence or Violence by Co-Workers, Customers, or Vendors

The District has a zero-tolerance policy for violent acts or threats of violence against our employees, customers, or vendors.

We do not allow fighting, threatening words or threatening conduct. Guns or any other weapons are strictly prohibited and not permitted on the premises. Any employee found with any of these items in their possession will be subject to severe disciplinary action, up to and including termination of employment.

No employee should commit or threaten to commit any violent act against a co-worker, customer or vendor. This includes discussions of the use of dangerous weapons, even in a joking manner.

Any employee who is subjected to or threatened with violence by a co-worker, customer, or vendor, or is aware of another individual who has been subjected to or threatened with violence, must immediately report this information to the employee's supervisor or manager or Human Resources. All threats must be taken seriously.

K. Training

All employees at the workplace, including management employees, receive effective training on workplace violence prevention when the WVPP is first established, and annual thereafter.

This training includes:

1. The WVPP, how to obtain a copy of the Plan at no cost, and how to participate in the development and implementation of the Plan.
2. A review and definitions and requirements under the WVPP.
3. How to report workplace violence incidents or concerns to the District or law enforcement without fear of reprisal.
4. Workplace violence hazards specific to the employees' jobs, the corrective measures the District has implemented, how to seek assistance to prevent or respond to violence, and strategies to avoid physical harm.
5. The violent incident log and how to respond copies of workplace violence hazard identification, evaluation and correction, training records and violence incident logs.
6. An opportunity for interactive questions and answers with a person knowledgeable about the District's Plan.

Additional training and instruction will be provided to all personnel whenever the District is made aware of new or previously unrecognized security hazards. This training may be limited to addressing the new workplace violence hazard or changes to the Plan.

L. Identification and Evaluation of Workplace Violence Hazards

The District conducts hazard assessments to identify and evaluate workplace violence hazards and threats of workplace violence. Inspections are conducted as appropriate after the development of the WVPP.

Hazard Assessments

The WVPP Administrator, or designee, performed a comprehensive workplace hazard assessment for workplace violence prevention by completing the **Workplace Violence Hazard Assessment Checklist** (Appendix C) when the WVPP was developed.

Inspections

After the implementation of the WVPP, the WVPP Administrator, or designee, conducts inspections using the **Workplace Violence Hazard Assessment** (Appendix C) with the supplemental categories to identify and evaluate workplace violence hazards and threats of workplace violence. Inspections are performed according to the following schedule:

1. After each workplace violence incident
2. When new or previously unidentified workplace violence/security hazards are recognized
3. Periodic inspections scheduled to occur quarterly
4. Inspections for violence prevention/security hazards consist of identification and evaluation of

workplace hazards and changes in business practices and may require assessing for more than one type of workplace violence. These inspections evaluate risk factors for workplace violence in each unit and area of the facility, including areas surrounding the facility such as parking lots and outdoor areas.

Environmental risk factors will include, among others:

1. Employees working in locations isolated from other employees (including employees engaging with the public) because of being assigned to work alone or in remote locations, during night or early morning hours, or where an assailant could prevent entry into the work area by responders or other employees
2. Poor illumination or blocked visibility of areas where possible assailants may be present
3. Lack of physical barriers between employees and persons at risk of committing workplace violence
4. Lack of effective escape routes
5. Obstacles and impediments to accessing alarm systems
6. Locations within the facility where alarm systems are not operational
7. Entryways where unauthorized entrance may occur, such as doors designated for staff entrance or emergency exits
8. Presence of any objects that can be used as weapons in the areas where the public has access

The District performs inspections for each type of workplace violence by using the methods specified below to identify and evaluate workplace hazards.

Inspections for Assessing Type 1 Violence Security Hazards:

1. The exterior and interior of the workplace for its attractiveness to robbers
2. The need for security surveillance measures, such as mirrors or cameras
3. Posting of signs notifying the public that limited cash is kept on the premises
4. Procedures for worker response during a robbery or other criminal act
5. Procedures for reporting suspicious persons or activities
6. Posting of emergency telephone numbers for law enforcement, fire and medical services where workers have access to a telephone with an outside line
7. Limiting the amount of cash on hand and using time access safes for large bills

Inspections for Assessing Type 2 Violence Security Hazards:

1. Access to, and freedom of movement within, the workplace
2. Adequacy of workplace security systems, such as door locks, security windows, physical barriers and restraint systems
3. Frequency and severity of threatening or hostile situations that may lead to violent acts by persons who are service recipients of our establishment
4. Workers skill in safely handling threatening or hostile service recipients

5. Effectiveness of systems and procedures to warn others of a security danger or to summon assistance, e.g., alarms
6. The use of work practices such as "buddy" systems for specified emergency events
7. The availability of worker escape routes

Inspections for Assessing Type 3 Violence Security Hazards:

1. How well our District's anti-violence policy has been communicated to employees, supervisors and managers
2. How well our District's management and employees communicate with one another
3. Our employees', supervisors' and managers' knowledge of the warning signs of potential workplace violence
4. Access to, and freedom of movement within, the workplace by non-workers, including recently discharged workers or persons with whom one of our worker's is having a dispute
5. Frequency and severity of worker reports of threats of physical or verbal abuse by managers, supervisors or other workers
6. Any prior violent acts, threats of physical violence, verbal abuse, property damage or other signs of strain or pressure in the workplace
7. How well our District's restraining order policy has been communicated to workers, supervisors or managers

Inspections for Assessing Type 4 Violence Workplace Security:

1. Assess the factors for Type 3 Violence above
2. Frequency and severity of worker reports of threats of physical or verbal abuse by a person who has a personal relationship with the employee
3. Frequency and severity of worker reports of threats by individuals with history of violent/threatening behavior
4. Frequency and severity of domestic violence situations brought to work

   Any prior violent acts, threats of physical violence, verbal abuse, property damage or other signs of violence by a person who has a personal relationship with an employee

M. Procedures to Correct Identified Workplace Violence Hazards

The District will correct under the authority of the WVPP Administrator, or designee, correct unsafe or unsafe conditions, work practices and work procedures in a timely manner based on the severity of the hazard: (A) When observed or discovered; and, (B) When an imminent hazard exists which cannot be immediately abated without endangering employee(s) and/or property, remove all exposed personnel from the area except those necessary to correct the existing condition. Employees necessary to correct the hazardous condition shall be provided the necessary safeguards.

If an identified corrective measure cannot be implemented within this timeframe, the District will take interim measures to address any imminent or serious hazard while completing the permanent control.

Corrective measures may include, but are not limited to:

Type 1 Violence

Corrective measures for Type 1 Violence security hazards may include, but are not limited to:

1. Making the workplace unattractive to robbers and other criminal acts
2. Utilizing security guards or surveillance measures, such as cameras or mirrors, to provide information as to what is going on outside and inside the workplace
3. Reporting procedures for notifying designated employees of suspicious persons or activities.
4. Posting emergency telephone numbers for law enforcement, fire and medical services where employees have access to a telephone with an outside line
5. Posting signs saying cash register only contains minimal cash
6. Leaving a clear unobstructed view of cash register from street
7. Limiting cash on hand and using a drop safe, limited access safe, or similar
8. Using armed services to pick-up cash
9. Training on emergency action procedures for employees, supervisors and managers
10. Using alarm systems and access control systems
11. Addressing adequate lighting
12. Addressing employee isolation factors
13. Using alarm systems and access control systems
14. Increasing police patrol in area
15. Posting laws against assault, stalking, or other violent acts
16. Other: (Employers are encouraged to site specific hazards here)

Type 2 Violence

Corrective measures for Type 2 Violence security hazards may include, but are not limited to:

1. Training
2. Controlling access to the workplace and freedom of movement within it, consistent with business necessity
3. Examining and addressing employee isolation
4. Ensuring adequate workplace security/access control systems, such as door locks, security windows, physical barriers, and restraint systems.
5. Providing worker training in recognizing and handling threatening or hostile situations that may lead to violent acts by persons who are service recipients of our establishment.

6. Placing effective systems to warn others of a security danger or to summon assistance, e.g., alarms or panic buttons.
7. Providing procedures for a "buddy" system for specified emergency events.
8. Ensuring adequate emergency escape routes.
9. Eliminating access to potential weapons
10. Providing security personnel
11. Maintaining an accurate history of problem clients and notifications to employees
12. Posting laws against assault, stalking, or other violent acts

Type 3 Violence

Corrective measures for Type 3 Violence security hazards may include, but are not limited to:

1. Communicating effectively our District's workplace violence prevention policy to all employees, supervisors, and managers.
2. Enforcing policy of no tolerance for workplace violence
3. Implementing policy prohibiting weapons
4. Improving how well our establishment's management and employees communicate with each other.
5. Increasing employees, supervisors', and managers' awareness of the warning signs of potential workplace violence.
6. Controlling access to, and freedom of movement within, the workplace by non- employees, including recently discharged employees or persons with whom one of our employee's is having a dispute.
7. Providing counseling to employees, supervisors or managers who exhibit behavior that represents strain or pressure which may lead to physical or verbal abuse of co- workers.
8. Ensuring all reports of violent acts, threats of physical violence, verbal abuse, property damage or other signs of strain or pressure in the workplace are handled effectively by management and that the person making the report is not subject to retaliation by the aggressor.
9. Ensuring worker disciplinary and discharge procedures address the potential for workplace violence.
10. Providing security
11. Posting laws against assault, stalking, or other violent acts
12. Applying crime prevention measures through environmental design and administrative measures

Type 4 Violence

Corrective measures for Type 4 Violence security hazards include, but are not limited to:

1. Providing domestic violence training
2. Enforcing policies on handling and preventing, violence situations

3. Restraining orders
4. Control access to the workplace and freedom of movement within it, consistent with business necessity
5. Enforce policy prohibiting weapons
6. Reporting procedures
7. Relocating work site or staggering work hours
8. Necessary staff notifications on restraining orders or potential threats
9. Personnel security
10. Post laws against assault, stalking or other violent acts

N. Post-Incident Response and Investigation

When a violent incident takes place, the WVPP Administrator, or designee, will promptly conduct a post-incident response and investigation.

Post-Incident Response

The procedures for post-incident response include:

1. Providing immediate medical care or first aid to employees who have been injured in the incident;
2. Taking any necessary measures to prevent others from being injured
3. Identifying all employees involved in the incident
4. Assess whether any additional threats could arise because of or in conjunction with the incident
5. Conducting a post-incident debriefing session as soon as possible after the incident with all employees, supervisors, and security involved in the incident
6. Checking in with affected team member(s) by asking how they are doing and what they need including connecting them with the employee assistant program (EAP), as needed
7. Following Human Resources and any agency procedures for reporting and filling out forms
8. Evaluating the incident for gaps or deficiencies in emergency response plans

Once a threat has subsided and immediate safety and health concerns have been addressed, the attention of the District's leadership, managers, supervisors, and Human Resources staff should turn to the well-being of team members. If an incident is severe enough to cause team members to leave the workplace, provide guidance on when and where work will resume. When appropriate, leadership may consider whether to offer paid administrative leave.

The EAP is a useful resource when communicating with and providing support to team members on a group or individual basis. Individuals respond differently to stressful situations and EAP is available to help navigate these dynamics. EAP can help address the mental and emotional well-being of team members once all physical threats are resolved.

Investigative Procedures

The incident investigation is a systematic method for collecting factual information that makes it possible to accurately reconstruct the workplace violence incident and determine the underlying reasons for the cause of the incident. Once the root causes of the incident have been determined, corrective actions and preventative measures can be identified and effectively instituted. The basic steps in conducting an incident investigation are:

1. Visit the scene of the incident as soon as possible;
2. Involve workers who work in the area or worksite where the event occurred in the incident investigation as they may have some special insight into potential causes and solutions;
3. Identify root causes of the incident. Ask "why" the perpetrator acted, "why" the worker responded in a certain way, etc.;
4. Interview involved workers and any witnesses;
5. Collect and review relevant information, including records related to training, maintenance, inspections, audits, and past incident reports;
6. Collecting facts on what, where, when, and how incident occurred.
7. Examine the area for security risk factors associated with the incident, including any reports of previous inappropriate or violent behavior from the perpetrator;
8. Obtain any reports completed by law enforcement.
9. Determining the cause of the incident and identifying contributing causes.
10. Recording the findings and corrective actions taken.
11. Complete the **Investigation Report Form** (See Appendix B) and **Violence Incident Log** (Appendix A).
12. Reviewing and revising the WVPP as needed.

When conducting an investigation, it is important to:

1. Investigate in an objective, fact-finding manner using probing, open-ended questions;
2. Take pictures and preserve all evidence as appropriate; and
3. Protect the privacy of the individual(s) involved.

Once the incident investigation is completed, take corrective action to prevent the incident from reoccurring and record the findings and corrective actions taken on Investigation Report form.

Violent Incident Log

The supervisor or manager should complete a **Violent Incident Log (Appendix A)** for all reports or incident of workplace violence. A copy will be provided to the WVPP Administrator and Human Resources.

O. Review of the WVPP

The District will review the effectiveness of the WVPP in the first quarter of each calendar year, including

the violent incident logs, and revise the Plan as needed. The WVPP will be reviewed with all managers, supervisors, and employees. The WVPP will be reviewed annually, when a deficiency is observed or becomes apparent, and after a workplace violence incident.

The WVPP Administrator will coordinate the review and development of this Plan. The Plan will be reviewed on an annual basis. Changes may also be made due to information or guidance received from the California Division and Standards Board. Changes will be tracked using a record of changes table. Comments or suggestions for improving this Plan may be provided to Human Resources or the WVPP Administrator.

We encourage active involvement of all employees and authorized employee representatives in reviewing, developing and implementing the WVPP. We will facilitate active involvement by all employees through their participation in identifying, evaluating, and correcting workplace violence hazards, in designing and implementing training, and in reporting and investigating workplace violence incidents.

We will facilitate active involvement of all employees through periodic reminders in the form of formalized employee training, emails, and other communication for raising awareness about the importance of our workplace violence prevention policies, threat and incident reporting procedures, and incident response practices.

P. Recordkeeping

The District maintains records as follows:

1. Records of workplace violence hazard identification, evaluation, and correction must be created and maintained for a minimum of five years
2. Every incident, post-incident response, and workplace violence injury investigation shall be recorded in a violent incident log. The log will be reviewed annually in conjunction with the review of the WVPP. It must be maintained for a minimum of 5 years.
3. Records of workplace violence training must be maintained for a minimum of one year. Training records will include the dates that training was conducted, the contents or a summary of the training sessions, names and qualifications of persons conducting the training, and names and job titles of all persons attending the training sessions.
4. Records of workplace violence incident investigations must be maintained for **a minimum of five years**. These records shall not contain "medical information," as defined in subdivision (j) of Section 56.05 of the Civil Code.

All records required by this subdivision will be made available to the California Division and Standards Board upon request for examination and copying.

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

- Records of Workplace Violence Hazard Identification, Evaluation
- Training records
- Violent Incident Logs

Appendix A: Violent Incident Log

The information in this log should be elicited from employees who experience workplace violence and be based on any investigative findings, including any witness statement relied upon.

The log must omit personal identifying information of any person involved in the violent incident (e.g., name, address, phone number, etc.)

Violent Incident Log	
Employee Name:	Job Title:
Supervisor Name:	Supervisor Title:
Date and Time of Incident: am/pm	Location of Incident
Detailed description of the incident:	
Workplace Violence Type *(check all that apply)*	
☐ Type 1 Violence: workplace violence committed by a person who has no legitimate business at the workplace but to commit a robbery or other crime ☐ Type 2 Violence: workplace violence directed at employees by customers, clients, patients, students, or visitors	☐ Type 3 Violence: workplace violence against an employee by present/former employee, supervisor, or manager ☐ Type 4 Violence: workplace violence committed in the workplace by a person who does not work there but has or is known to have had a personal relationship with an employee
Who committed the violence?	
☐ Client/customer ☐ Family/friend of client/customer ☐ Stranger with criminal intent ☐ Co-worker	☐ Supervisor/Manager ☐ Partner or spouse (current or former) ☐ Parent or relative ☐ Other _____

At the time of the incident was the employee(s)?	
☐ Completing usual job duties ☐ Working in poorly lit area ☐ Rushed ☐ Working during low staffing level ☐ Working in an unfamiliar or new location	☐ Isolated or alone ☐ Unable to get help or assistance ☐ Working in a community setting ☐ Other _____
Where did the incident occur?	
☐ In the workplace ☐ Restroom ☐ Breakroom/cafeteria	☐ Parking lot/other area outside premises ☐ Other workplace area _____

Type of incident *(check all that apply)*

Physical Assault	**Attack with weapon or object**	**Physical intimidation**
☐ Biting ☐ Choking ☐ Grabbing ☐ Hair pulling ☐ Kicking ☐ Punching ☐ Slapping ☐ Pushing ☐ Pulling ☐ Scratching ☐ Spitting ☐ Other:_____	☐ Firearm ☐ Knife ☐ Other object_____ **Sexual assault or threat** ☐ Rape or attempted rape ☐ Sexual Assault ☐ Physical display ☐ Other unwanted verbal/physical sexual contact ☐ Other _____	☐ Stalking ☐ Threat of physical force ☐ Threat of use of weapon/other object ☐ **Animal attack** ☐ **Other _____**

Did the employee receive medical treatment for the injury?	☐ Yes	☐ No
Was security or law enforcement contacted?	☐ Yes Who? _____ What was their response? _____	☐ No

Actions taken to protect employees from a continuing threat or from other hazards identified as a result of the incident;

Report Completed By (Name):	Title:
Date Completed:	

Appendix B: Investigation Report

Workplace Location/Department		Specific location/department where Incident Occurred	
Name of Impacted Employee(s)			
Employee's Occupation			Date of Incident
Did Employee leave work due to incident?	Yes No	Date: Time: AM PM	Time of Incident AM PM
Did Employee return to work?	Yes No	Date Reported to you:	Time Reported: AM PM
Name of Witnesses			
Name and Address of Doctor or Hospital where injured was Treated			
What was Employee doing during incident? (Please be specific)			
How did the Incident occur? (Please describe fully the events that resulted in injury. Tell what happened and how it happened. Please use separate sheet if necessary.)			
Was the employee injured? (If so, the object or Individual that directly injured employee.)			
Describe the Injury – part of the body affected			
Possible Contributing Factors for Incident			

What corrective actions have or will be taken to address condition and prevent recurrence? 1. 2. 3.
Investigation conducted by:_____(Name) _____(Title) Date:

Appendix C: Workplace Violence Prevention Risk Assessment Checklist

This checklist should be used as part of its regular assessment of environmental and risk factors for workplace violence. In the "Notes" column, explain the specific circumstances of risk factors identified and/or indicate follow up required on a specific item. Beyond observing the physical environment, this assessment may require review of documents and consultation with employees. In the "Comments" section at the end, indicate what corrective actions are being taken.

	Yes	No	Notes
STAFFING			
Is there someone responsible for building security? If "yes," identify the individual.			
Do employees work alone or in isolation?			
Do employees work late at night or during early morning hours?			
Do employees work in remote locations of the facility?			
Is there sufficient staffing to permit those who are assigned to assist with a workplace violence incident to respond to an incident?			
JOB DUTIES			
Do employees work with drugs or medication?			
Do employees handle cash?			
Do employees work with clients or visitors who have a history of violent behavior or behavior disorders?			
WORKPLACES/EVENTS			
Do employees work off site, at customer or other locations (other than remotely from home)?			
Do employees work at shared/co-working locations?			
FACILITY DESIGN			
Are there enough exits and adequate routes of escape?			
Are exits accessible and clearly marked?			
Can exit doors be opened only from the inside to prevent unauthorized entry?			
Is the lighting adequate to see clearly in indoor areas?			
Are there any areas of blocked visibility?			
Are there employee-only work areas that are separate from public areas?			

	Yes	No	Notes
Is access to work areas only through a reception area?			
Are reception and work areas designed to prevent unauthorized entry?			
Are there physical barriers between employees and potential assailants?			
Could someone hear a worker call for help?			
Are work areas free of objects that could be used as weapons?			
Is furniture in work areas arranged to prevent workers from becoming trapped?			
Is a secure place available for workers to store their personal belongings?			
Are private, locked restrooms available for staff?			
Is there adequate lighting within the worksite?			
SECURITY MEASURES			
Does the workplace have?			
Security cameras or closed-circuit TV in high- risk areas?			
Door locks?			
Internal phone system to activate emergency assistance?			
Phones with an outside line programmed to call 911?			
Security mirrors (convex mirrors)?			
Secured entry (buzzers)?			
Communication devices?			
OUTSIDE THE FACILITY			
Do workers feel safe walking to and from the workplace?			
Do employees work in high crime areas?			
Are the entrances to the building clearly visible from the street?			
Is the area surrounding the building free of bushes or other hiding places?			
Is video surveillance provided outside the building?			
Is there enough lighting to see clearly outside the building?			
Are all exterior walkways visible to personnel?			

	Yes	No	Notes
Is there a nearby parking lot reserved for employees only?			
Is the parking lot secure?			
Is the parking lot free of hiding places?			
Is there enough lighting to see clearly in the parking lot and when walking to the building?			
Is there offsite parking that employees use?			
Have neighboring facilities and businesses experienced violence or crime?			
Are there any entryways where unauthorized entrance may occur?			
Is the employee parking garage secure when arriving, leaving, and during changes of shift?			
WORKPLACE PROCEDURES			
Are employees given maps and clear directions in order to navigate the areas where they will be working?			
Is public access to the building controlled?			
Are floor plans posted showing building entrances, exits?			
Are these floor plans visible only to staff and not to outsiders?			
Is other emergency information posted, such as the telephone numbers?			
Are security measures taken to protect workers late at night (escorts, locked entrances, etc.)?			
Are access and freedom of movement within the workplace restricted *to* those persons who have a legitimate reason for being there?			
Are visitors escorted to offices for appointments (if applicable)?			
Is there an established procedure for signing in visitors?			
Are authorized visitors to the building required to wear ID badges?			
Are identification tags required for staff (omitting personal information other than first name)?			

	Yes	No	Notes
Is there a procedure for reporting suspicious persons or criminal acts to law enforcement?			
Is there an established liaison with local police and counseling agencies?			
Are customers or visitors in waiting areas clearly informed how to use the department's services so they will not become frustrated?			
Are waiting times for customer services kept short to prevent frustration?			
Are broken windows and locks repaired promptly?			
Are alarm systems (panic button alarms, silent arms, personal electronic alarm systems, etc.) being used for prompt security assistance?			
Are security devices (locks, cameras, etc.) tested on a regular basis and repaired promptly when necessary?			
Are escorts or "buddies" provided for people who work in potentially dangerous situations?			
Do employees know to use security escort service after hours?			
After hours, is the building locked down with only one access point?			
Do employees use the "buddy system" when leaving work after hours?			
Are employees able to locate emergency equipment (fire alarm boxes, emergency generator outlets, etc.)?			
Is emergency equipment accessible and free from obstruction?			
Are employees able to locate cellular phones, power failure phones, and/or radios for emergency communication?			
Do employees know proper procedures if a firearm threat is announced?			
Is the employee emergency call back list up to date and available?			
Do employees provide privacy to reflect sensitivity and respect for clients and visitors?			
Do employees use the "buddy system" to work together if problems arise?			

	Yes	No	Notes
Do employees working in the field have cellular phones or other communication devices to enable them to request aid?			
Is there an evacuation or shelter plan for workplace emergencies (fire, earthquake, etc.)?			
Are staffing levels appropriate for department/worksite functions?			
Are reference manuals up-to-date and available to employees?			
Is there an established procedure to administer worker discipline?			
Is there an established procedure to discharge a worker?			
Is there a grievance policy available to employees?			
Is there a Safety Committee available as a resource to staff for any hazard concern?			
INCIDENT HISTORY			
Has the worksite experienced violent behavior or threats from strangers?			
Has the worksite experienced violent behavior or threats from customers or clients?			
Has the worksite experienced violent behavior or threats from other employees?			
Has the worksite experienced violent behavior or threats from former employees?			
Has the worksite experienced domestic violence issues?			

Inspections – Categories In Addition to Those Identified Above

In addition to the factors identified in the above assessment, the following categories are considered as part of the inspection of environmental and risk factors for workplace violence, after each workplace violence incident, whenever the employer is made aware of a new or previously unrecognized hazard, and as otherwise scheduled.

MANAGEMENT COMMITMENT AND EMPLOYEE INVOLVEMENT			
Do managers, supervisors, or employees accept violence or threats of violence as “part of the job”?			

Do employees communicate information about potentially threatening customers or visitors to appropriate staff?			
Does management communicate information to workers about workplace violence incidents?			
Are employees familiar with the District's violence prevention policy?			
TRAINING			
Have employees received training on the WVPP?			
Are workers trained in the emergency response plan (i.e., escape routes, notifying proper authorities)?			
Are workers trained on how to ask for assistance by phone or alerting other staff?			
Are workers trained to report violent incidents, threats, or other workplace violence concerns?			
Have employees been trained on the workplace hazards specific to their jobs?			
Are workers trained in how to handle difficult customers or visitors?			
Are workers trained in how to recognize and handle threatening, aggressive, or violent behavior?			
Are workers trained in ways to prevent or defuse potentially violent situations?			
Have employees been trained in verbal de-escalation techniques?			
Are workers trained in personal safety and self-defense?			
Are workers assigned to respond to incidents of workplace violence adequately trained?			
REPORTS/COMMUNICATION			
Has the WVPP been effectively communicated to workers and their supervisors?			
Do workers, supervisors, and managers have sufficient knowledge of warning signs of potential workplace violence?			
Is there a notification system for alerting workers of emergencies or potential danger?			
Are violent incidents or threats being reported frequently?			

Are workers and their managers aware of how they should report violent incidents, threats, or other workplace violence concerns?			
Are employees required to report incidents or threats of violence, regardless of injury or severity?			
Is the reporting system clear?			
Were medical and psychological counseling services offered to employees who have been assaulted or threatened?			
PRIOR INCIDENT REVIEW			
Were all workplace violence incidents that occurred in the previous year reviewed pursuant to this assessment?			
Were any corrective actions taken as a result of any prior incidents of workplace violence reviewed pursuant to this assessment?			
What do the prior incidents reveal about the WVPP?			

COMMENTS: _____

_____

_____

_____

Checklist Completed By: _____ Date:_____

Department/Unit: _____