

# Handbook Audit Checklist

## Montessori Makers Toolbox

Quick scan: can staff understand expectations without guessing?

✓ Policy Must-Haves (check if it's clearly written)

- ☐ Work calendar + required days
- ☐ Work hours / arrival / dismissal expectations
- ☐ Pay schedule + benefits summary
- ☐ PTO + sick time (what you get + how to request)
- ☐ Absence reporting + coverage expectations
- ☐ Communication norms (email/text boundaries)
- ☐ Meetings (what's required + when)
- ☐ Professionalism standards (examples included)
- ☐ Conflict process (what to do when there's a problem)
- ☐ Coaching + evaluation timeline
- ☐ Discipline pathway (warnings → next steps)

- ☐ Mandated reporting expectations
- ☐ Safety basics (emergencies / incident reporting)

✓ "Red Flag" Checks (if yes, fix it)

- ☐ Policies contradict each other
- ☐ Key policies live only in emails/texts
- ☐ Expectations depend on "who remembers"
- ☐ The handbook is outdated or unlabeled
- ☐ Staff regularly ask the same policy questions

## ★ Quick Score

0–6 checked: high confusion risk

7–10 checked: decent foundation

11–13 checked: strong clarity ✓

Want ready-to-use handbook + policy templates?

Montessori Makers Toolbox →  
[montessorimakersgroup.org](https://montessorimakersgroup.org)