INTRODUCTION

Before we discuss policy, let's talk about the sixth edition of NSBA's school policy reference manual. If you're a long-time EPS subscriber or a veteran user of the Reference Manual, you might be startled by the new look and name for NSBA policy resources. In the past you've found the policy publications and the Policy Clearinghouse to be valuable tools in policy development. Many of you have based your own school policy manual on the EPS coding system because it offered a logical, organized policy classification guide. Now you've noticed some dramatic changes in the look and organization of the Reference Manual as well as in some of the policy codes and are asking,

1) Why change a good thing?

First, we hope to make a good thing better by making the Reference Manual easier to use and more relevant to a wealth of new policy areas that have emerged since the Manual's last revision in 1984.

Second, we are recognizing the new school policy environment. During its 20 years of policy service to local Boards, school administrators, and state school boards associations, NSBA has seen the policy environment change dramatically — most notably with the emergence of state school boards associations as the linchpin of leadership for state public education policy.

When NSBA first obtained the Davies-Brickell classification system in the early 1960s, the organization used this pioneering coding method as a way to encourage school districts to commit their policies to written form. Since that time, many school districts and school boards associations have developed other policy classification systems (most often using numerical codes) or have adapted the alphabetical codes to meet their state or local needs.

Although some state school boards associations and many local districts use the NSBA system code for code, most do not. This fact does not take away from the value of the Reference Manual and NEPN as a policy resource. It is and always will be a treasure-trove of policies and policy-related information from school districts and state school boards associations across North America. This policy wealth helps school districts in their continuing and all-important task of policy review and development.

In many cases state school boards associations have particular expertise to provide an appropriate coding system for school district policies. With as many different state and local education environments as exist in the United States and Canada, no one policy classification system can best serve those varied needs. We hope that the changes in NSBA's policy codes reflect a recognition that, although necessary to organize and present policy information, the specific codes are information retrieval devices as well as a protocol. You should consider the NEPN classification guide as a guide to be adapted to your local district and state's needs or as an information retrieval system by which you can extract valuable policy information no matter what coding scheme is used to organize your policy manual.

Some districts have used the NSBA/NEPN classification system "as is" — and it will continue to serve that purpose. We hope the changes have improved on this system. In fact, the changes were based on the changes that school districts and state school boards associations were making in their own policy manuals, either because of utility or logic. For example, student extracurricular activities was moved from Section I, Instruction, to Section J, Students, because that's how many districts were handling this coding issue.

Whether or not your district uses the NEPN classification system, NSBA policy resources are valuable to all school districts because of the policy information and ideas contained within the pages of the Reference Manual and In the other publications and services that NSBA provides. Also, this Administrator's Guide and Code-Finder will provide quick and easy reference to whatever topic is on your policy plate at the moment. As always, the NEPN staff stands eager and ready to help you in whatever way we can.

NSBA works in partnership for public education with state school boards associations and local school districts. NSBA provides a forum for communication among school districts and states coast-to-coast and delivers as many national resources as possible to promote effective policy development in education. NSBA works closely with state school boards associations to help them in their paramount mission of assisting local districts carry out their state-chartered education mission.

2) Why change the name to NEPN?

We changed the name to better reflect the idea of a lively forum for the communication and exchange of policy information and ideas. "Network" best describes the resources available in NSBA's Policy Clearinghouse; "National" gives a better idea of the scope of policy exchange. A "national network" gives an accurate picture of communicating policy resources among school districts and state school boards associations via NSBA publications and direct responses by Clearinghouse staff to inquiries.

3) What policy resources does NSBA provide?

NSBA/NEPN policy resources, available through purchasing "Package A", include the monthly newsletter, *Updating School Board Policies*; *Administrative Angle*; the *Education Policy Reference Manual*; and its companion publications, *The School Administrator's Guide*, *The School Board Member's Guide*, and the *Code-Finder Index*; and the Policy Clearinghouse. Also available from NSBA are the *School Personnel Management System*; and the *Educational Goals Survey*. (Each resource is described briefly in the following paragraphs.) All these resources will continue to serve your policy needs, but their style and tone will change somewhat to reflect the fact that NSBA offers a policy resource rather than a policy service.

Updating School Board Policies — a monthly (11 times a year), eight-page policy publication featuring articles on policy topics of general interest. Trends and new approaches in curriculum, student services, staff development, school planning, and Board development are identified and explained by education practitioners. New policy ideas and analyses on recent school law decisions are regular features. Each month the Policy Adviser column answers the questions most frequently asked of NSBA's Clearinghouse staff.

Administrative Angle — a quarterly report for the policy administrator containing specific recommendations for researching, drafting, coding, and implementing policies.

NEPN *Education Policy Reference Manual* — a two-volume policy resource containing a diverse sample of policies, regulations, and exhibits from school districts across North America.

NEPN Policy Classification System — an alphabetical coding system for school policies, regulations, and exhibits. These codes are listed behind each alphabetical tab of the Reference Manual.

Code-Finder Index — a look-it-up reference that enables easy use of the Reference Manual no matter what coding system your school district uses. Also, the Code-Finder lets you know where to find policies on topics not specifically listed in the classification codes.

The School Administrator's Guide — a complete listing of the policy classification system and complete descriptions of the codes used in the Reference Manual.

The School Board Member's Guide — a primer on the role of the school Board member and the school Board in policy development and policy making. Noted authors from the education community present their views on community involvement in Board policy making, drawing the line between policy making and administration, and the challenge of being an effective school Board member who serves on an effective school Board.

Policy Clearinghouse — The NSBA/NEPN library of school policies and policy information put at your doorstep by way of the Clearinghouse staff and Search Certificates.

School Personnel Management System — the personnel administrator's resource to developing effective job descriptions and personnel policies. This manual offers guidelines and procedures to recruit, select, evaluate and manage school employees and to help district administrators keep personnel policies and practice, legal and current. In includes model job descriptions, sample policies, exhibits of application forms, affirmative action plans, interview questions and master checklists of performance responsibilities.

Self-Help Publications — a variety of publications published by NSBA designed to help school Board members and administrators in their day-to-day responsibilities of policy making and implementation. Board self-evaluation, school Board elections, school budgets, merit pay, and school reform are among the many topics.

Educational Goals Survey - a unique "do-it-yourself" survey kit that enables you to find out the goals and priorities of your school personnel, community residents, students, and recent graduates. It includes more than 250 learning goals that will help you get the answers you need for effective policy development.

[For more information about any of these publications, just call NSBA at (703) 838-6722.]

Part I: Supporting the Board's Policy Development Process

1

Policy Terms and Styles

Although all school Boards make policy, how they describe the different components of the policy process varies dramatically. What is a regulation to some is a procedure or rule to others — or to make matters more complicated, some policies include the implementation procedures either within the policy or on the same page. To publish a national policy manual, consistency of style and word usage is necessary. Thus, the following terms and points of styles will be used throughout the Reference Manual and its publications. Some of the definitions below have been adapted from *Becoming A Better Board Member*, 1989, National School Boards Association, pps. 282-290.

School Board — Board of Education, School Committee, Board. The legal entity, whose members are either elected or appointed, governing the school district in matters relating to public education. Although most school districts are fiscally autonomous, some depend on obtaining budget approval from local political officials or by voter approval in a budget referendum.

Policy — rules, guidelines, statements of goals adopted by the school Board as a legal entity, traditionally considered as guides to

discretionary action; statement adopted by a school Board or an administrative agency outlining principles to be followed with respect to specific matters; usually requires rules or regulations to be formulated for its implementation, and is broad enough to provide for administrative decisions regarding the manner in which it will be implemented.

Regulations — procedures, administrative rules, the means of policy implementation. Directive prepared by the school administration that sets forth the mechanics for implementing Board policy. Tells how, by whom, where, and when things are to be done.

Bylaws — usually identical to the rules of procedure that govern the internal affairs of the school Board such as order of Board business, voting, setting agenda, calling of meetings, etc. A code or collection of rules adopted by a Board for the regulation of its own organization and proceedings; must not conflict with the statute or charter by which the Board is created, but may go further into detail to carry out the intent of the legal guidelines.

Will/Shall — Will is used instead of shall to avoid the stilted, formal, sometimes intimidating style of language.

He/She — whenever possible the use of he/she is avoided by referring to the position, "the superintendent," for example. In no case, is the pronoun "he" used by itself in a policy or regulation.

2

The Forgotten Sheep — School Policy

Policies are important. They establish directions. They tell what the Board wants and why. They set goals. They assign authority and they establish controls. They make school governance and management possible. What's more, they are the means by which educators are accountable to the public. In this same light, the policy process is the best way to provide for systematic and responsible public involvement in education.

You don't need to be convinced of the importance of school policies. As a policy administrator, much of your working life is spent responding to weaknesses in your current policy manual and trying to strengthen it to avoid the problems of reactive policy making. Probably your job would be easier if policy was a more visible, articulate topic. Try bringing up "policy development" at the next party you attend. Teachers don't have that problem; their classroom craft enjoys wide public visibility and empathy, particularly among parents of school-age children.

Although policies drive every aspect of school operations — and chart the course of the district's future — "policy talk" is little part of most discussions at PTA meetings, for example. In fact, many parents are unaware of the existence of a school policy manual and have little understanding of the "hows" and "whys" of the school policy process until they are aggrieved in some fashion. In contrast, most citizens are well aware of the U.S. Congress as a policy body and the existence of federal laws, even though they have little specific knowledge about the content of those laws.

This situation complicates the policy administrator's job because many of the stakeholders in education only are concerned with the bottom line — and they tend to get involved in the policy process when they want something out of it. At that point, the administrator's explanations of the difference between policies and

regulations and the complex nature of the Board committee system often falls on deaf ears of the critics who have turned to others to deliver swifter attention to their needs.

Furthermore, new school Board members — and even some veterans — are unfamiliar with or perhaps uninterested in the policy process. It's not hard to get excited about action on a particular issue, but the more cumbersome, deliberative process of policy development, communication, and feedback holds little interest. They aren't sure what "policy" means or why policies are important. Most newcomers approach the Board table inexperienced in the governance and management of public education; they are unfamiliar with the role of a Board of directors in any enterprise. They may want to jump in and "get things done" regardless of constraints on their own or the Board's authority, regardless of complications the actions might cause. Moreover, the line between governance and management is not clearly marked. Even experienced members at times may have trouble seeing the distinction between governing a school system and managing one.

"The word 'policy' is so loosely used these days that new people in a school district organization — whether Board members, administrators or active staff members — often wonder which is the 'real' thing," notes Marjorie M. Martin, assistant director of policy for the New Jersey School Boards Association (*School Leader*, August/September 1990).

If, as an administrator, you must deal with problems resulting from the lack of understanding of the school policy process, a long-term educational effort about policy with your Board might set you in the direction of improvement. First, make sure the Board member's handbook includes a primer on the district's school policy process. Also incorporate policy education into Board workshops, retreats, and Board meetings whenever possible. And don't let an issue be discussed (or written about, such as in Board briefing documents or materials) without a reference to the relevant policy or policies.

When doubts arise as to the need for spending precious time at Board meetings considering new and revised policy, it might be wise to encourage the Board to reflect on what people expect of their school Boards. Parents expect their children to learn in school. They expect school officials to provide safe, friendly, and challenging environments for learning. They expect teachers to care about their children and to make special efforts to help the ones with disabilities or learning problems. The public expects students to emerge from their public school experience as capable young men and women who know how to read, write, compute, think, and behave as responsible and contributing members of society.

Ultimately, the school Board is accountable to the people for the way schools are governed and managed, and for the results achieved. That, of course, is as it should be, for the people are the stakeholders of public education.

Policies are more than the legal basis for the school system — they are the conditions of accountability throughout the school system. Also, the policy process is what ensures that policies are responsive to the needs they are designed to meet. Without the policy process, a Board or a superintendent might decide on policy content without reference to the various school publics who are involved in its implementation, who must pay for education, or who must suffer the consequences when educators do not succeed in fulfilling their charge. An effective policy process promotes accountability, involvement, and responsibility.

The need to educate various school constituencies about the importance of the policy process is a challenge, with no quick and easy answer forthcoming. One long-term approach is to popularize the policy process and policies themselves as often as possible by printing them on attractive paper and using a school logo or theme. Another strategy is to distribute individual policies widely in response to school issues or events throughout the year. For example, when a message about standardized testing is sent home, attach the district's policies on testing and assessment. There is no surer way to make certain that policies aren't read than by only depositing them in a cumbersome manual in the principal's office in each school. Policies, too, must be clearly written. Legal compliance does not mean having obscure language. If policies aren't written so that almost all of your constituents can understand them, you and the Board aren't doing your jobs.

Has your Board or Board policy committee thought about product testing your policy language before submitting a final draft for school Board review? Companies do it frequently to ensure that their advertisements or packaging convey the intended message to the people they are trying to reach. Try calling together a group of parents and community members — not the usual school activists but others whose names are culled from voter registration lists or parent directories. Read the draft policy to them. Ask for their candid views, on the interpretation of the language, the policy goals, and the means to achieve them. Usually, you'll find that these informal sessions provide valuable insights that will help the Board develop policy that is effective in implementation and persuasive to the public.

3

The Policy Process

Policy making is much more than approving a curriculum or adopting a budget. Developing and adopting policies occurs within the context of listening, acting, and responding to a variety of school publics who are interested in what the community's children learn and how that learning takes place. In recent years, the number of school publics has increased as business and industry, state legislatures, federal agencies, and a variety of groups have entered the local educational arena, thus joining the traditional school constituencies of parents, school employees, taxpayers, and local political officials.

Still, no matter the number of "school players," the policy process remains that of:

- Proposal/Idea by one of the players

- Study/Consideration by Board committees and other players

- Recommendation by superintendent

- Board deliberation

- Board action

- Administrative Implementation

- Feedback

    •informal: media, opinion leaders, word-of-mouth
    •formal: budget review, analysis in terms of efficiency,
                 effectiveness, and popularity

4

The Administrator's Role in Policy

You've heard the expression many times. The Board makes policy; The administration executes it. But the administration does more. It actually runs the policy-making system. It makes it go. Without the guidance and commitment of the superintendent and the help of the administrative staff, a school Board cannot function in policy development.

Administrative support for the Board's policy making is essential all along the line. Consider:

1. The development of one new policy. When any problem, issue, or need requires the formulation of a new or revised policy, the Board relies on the administration to:

   a. Present the Board with policy options, each carefully checked against legal, administrative and fiscal constraints. For policies that affect the instructional program, a further check for compliance with the system's educational philosophy is appropriate.

   b. Make arrangements to get ideas from staff, community, and students when proposed policy changes may affect these groups.

   c. Draft policies that reflect the Board's viewpoint, after the Board has considered its options.

2. The updating and reorganization of the Board's policy manual. When a Board needs to compile a policy manual for the first time or update and reorganize an existing one, it relies on the administration to compile a manual that accurately reflects the status quo of school system policy and regulations, the current practice of the Board and administration.

The distinction between these two types of administrative support is this: The first—helping the Board each time it develops single new policies — is a process. It never ends because the Board continually is confronted with new needs, trends, court decisions, laws, etc., that require new or revised policies. The second — compiling an up-to-date, well-organized manual of current policies and regulations — is a project with a definite beginning and an end. It starts with gathering every scrap of paper that depicts formal Board positions or policy implied by Board action and ends when that material is organized in a manual from which policies can be easily retrieved as they are needed.

The project need take place only once in a school system, provided the manual is continuously maintained; the process of policy development goes on and on.

This Guide will help you give appropriate administrative support to both the process of developing new policies and the project of compiling current policies in an organized, up-to-date, well-written manual.

5

Elements in Policy Development

Policy development is a dynamic process, not a once-and-for-all project. The process never ends because there is no end to the problems, issues, and needs that require policy solutions.

But while the topics requiring policy action vary widely, the elements in developing any policy are essentially the same. They are listed below — in boldface type — and in 1-2-3 fashion. But the elements will not necessarily arise in the identical order the outline suggests. At times some of them will overlap; some may be dealt with earlier or later.

Each element is followed by a discussion of the Board's responsibility and of how the administration can support the Board during that phase of the policy development process.

Element 1: Identify the Need for New Policy

Policy development begins when the Board recognizes that it faces an issue or problem requiring a long-term solution; when it becomes aware that the school system has an ongoing need to be answered through a new or revised program or way of functioning. Some problems, issues, and needs will be of first-rank importance. Others may be less significant, but still they demand solution.

Too often, the need for new or revised policy is sighted through the flares of crisis. Policies made under the gun court disaster. It's an important administrative responsibility to identify policy needs before trouble strikes.

In practice the development of a new policy starts, perhaps nine times out of ten, with the superintendent or the state school boards association calling the need for the policy to the Board's attention. Most school administrators recognize how important it is for the school system to be covered in important areas by written policies and regulations, and they regularly help the Board identify topics needing new policy action.

Element 2: Assemble Background Material

First the Board needs facts: How will state law control our actions and decisions on this issue? What costs are involved? How has this problem been solved in other school systems? Additionally, the Board will want suggestions from those persons who will administer the policy and from those whom the policy will affect. It will want the superintendent's recommendation.

Assembling data for the Board to examine as it studies the need for a new policy and possible solutions is, of course, an administrative responsibility.

The administration collects facts on needs, policy options, possible results, and costs of each. It investigates how the problem has been solved in other school systems in the state and the nation; examines legal ramifications; sounds out the staff, students, and parents. The full investigation may be assigned to a staff committee, perhaps working with a Board committee or a broad-based advisory committee functioning with the help of the administration.

NSBA's Education Policy Reference Manual is an excellent starting point to find diversity of policy language and approach. The 1991 edition offers more than 1,000 policies, regulations, and exhibits from school systems throughout North America. NSBA's

Policy Information Clearinghouse can provide even more information on particular policy problems. Next, the opinion of a school attorney and advice from the state school boards association often is sought; and suggestions are accepted from employee and other groups.

Element 3: Study, Discuss, Agree on Basic Substance

The Board must have time to study the problem and background materials. As it sifts suggestions, discusses and debates, the Board should pinpoint basic content—key points—that its policy should cover and try to reach agreement on the Board's position.

Again, administrative support is needed. The data collected must be presented and explained; opportunity must be given staff and other concerned persons—students, parents, public—to present their suggestions and opinions. The superintendent will be asked for a recommendation.

To help the Board grapple with basic substance, the superintendent may present one or more policy drafts—for when proposals are in writing, discussion of them goes more smoothly.

Element 4: Policy Drafting

Policy drafting and redrafting occur simultaneously with other phases of policy development. After the Board has reached tentative agreement on the content or key points that should go into a policy, however, it is a good idea to assign one person to draft the statement. That one person may be a Board committee chairperson, or very likely the superintendent.

The job of putting Board positions into words on paper in the form of a clear, coherent, well-written policy is a one-person task. Boards and committees can determine positions, make decisions, evaluate, and approve or disapprove policy drafts. But they waste enormous amounts of time stewing and fussing when they try to write sentences and cope with syntax.

General principles that apply to writing any good prose apply to policy writing—strive for clarity, coherence, effectiveness. Be as succinct as possible, but don't sacrifice adequacy for brevity. As a ghost-writer for the school Board, you also need to take special care to:

1. Present the Board's positions, not your own.
2. Write direct, positive statements.
3. Avoid pomposity and educational and legal jargon, which are occupational hazards for policy writers.

Before presenting a draft for official Board action, it may be useful or important, depending on the topic, to have the school Board attorney review it. In any case, it is advisable to check the draft against a list such as that shown in the box on this page.

Check List for Policy Drafts*

____1. The proposal is legally correct.

____2. The proposal includes a brief statement of intent.

____3. The proposal conforms with the school system's stated philosophy, goals, and objectives.

____4. The proposal does not conflict with other policies or regulations. If it does precipitate changes in other Board statements, these changes are included in an accompanying set of recommendations.

____5. Those who will be affected by the policy, or their representatives, have had an opportunity to react to it.

____6. Several people have read the draft to make sure its meaning is clear.

____7. Accompanying regulations or procedures, if needed, are presented; these are concise and the steps easily identified.

____8. The proposal deals basically with one topic.

____9. The proposal is properly coded and prepared in correct format.

____l0. The draft has been proofread five times for typographical and spelling errors.

* Adapted from a check list of procedures that accompanies a policy on policy development adopted by the Houston Board of Education.

Element 5: First Reading

The policy proposal is placed on a Board meeting agenda for a "first reading" and persons most interested in it are notified that the Board action is pending. Opportunity is given them and others at the meeting to voice their opinions.

Administrative responsibilities associated with the first reading include sending the tentative policy drafts out with the agenda to Board members and to persons and groups affected by the policy. If the topic is of major concern, you may need to schedule time at the meeting for presentations and for some words from the school attorney.

If the policy proposal encounters serious objections and the Board has second thoughts, there will be further work for the administration—more data to assemble, more alternative suggestions and sample policies to collect, more policy drafting to be accomplished. A second "first reading" may be necessary. If all goes smoothly, however, there is only the matter of scheduling a second reading on the agenda.

Element 6: Second Reading, Adoption

The period between the first and second reading gives all concerned persons a further chance to ask questions and offer improvements in the policy.

By the time of the second reading, the research and examination of facts, alternatives, and divergent points of view should have been accomplished. The final draft presented will reflect such changes In position and modifications as determined by the Board at the first reading. The Board is ready to vote, and it usually votes Yes.

But if further suggestions or objections have arisen in the meantime, or arise at the meeting, the proposal may go back once more to the administration with instructions as to what the Board wants.

Element 7: Inform, Disseminate

Adopting a policy is not enough. It must be made known to the persons affected by it. If it is a policy important to teachers, make sure that every teacher receives a copy. If it is a policy of interest to parents of kindergartners, use every channel to inform that group. If it is a policy of interest to community groups, distribute it to presidents of community organizations.

It's up to the administration, of course, to see that new policies get in the hands of the persons who will implement them, abide by them,

and who otherwise are concerned with the Board's positions. A policy will do a school system no good if it is buried in the minutes.

Part of policy communication includes coding the policy to the classification system in use (if this hasn't been done earlier) and sending copies to all holders of the manual along with instructions for insertion and perhaps for deletion of the statement it replaces.

Element 8: Implement

Few policies are self-starting. You have to put push behind a policy. The regulations for implementing a policy are developed by the superintendent or under the superintendent's direction. In many instances, the Board reviews and officially approves them.

An essential in policy implementation over the long haul is that all policies should be easily available to the persons who must enforce and abide by them. This means...a codified policy manual.

The administration has extensive responsibilities in the implementation of Board policy through the development of accompanying regulations—a process that is carried out best in tandem with development of the policy. Regulations are discussed in the following section of this guide.

Element 9: Enforce, Evaluate, Revise

Periodically the Board may want to ask the superintendent how the policy and its regulations are being enforced. Are they working? Are they in tune with the changing times? Do they need revision?

A Board relies on the administration for the enforcement of policy and, to a large extent, for evaluation of how new policies work out. It often specifically requests (in a policy) that the superintendent call to its attention policies that are out of date and those that need revision.

Just as the policy development process never ends, neither can the ongoing administrative support for policy making. Part of that support rests in a clear understanding of the difference between policies and regulations. The next section talks about that difference, as well as about why—and when—the Board should adopt regulations.

6

What about Regulations?

Note: This section appears in its entirety in *The School Board Member's Guide to Policy Development* as section 4.

Up to now we've been talking about policies; little has been said about regulations. But policies and their implementation through regulations go hand in hand.

A school Board policy might be called "a guide to action." It will state purpose or goal; it will express what the Board desires to achieve or wants to see happen; it will provide a rationale and framework for specific requirements; it may establish basic controls; it may assign general responsibility.

In contrast, a regulation will set forth specific requirements; it may list do's and don'ts; it may include step-by-step procedures; it may assign specific responsibility. Regulations provide the details for carrying out policy and enforcing it.

In most instances, Boards prefer to ask the superintendent and the administrative staff to draft the regulation that will support a policy. That makes sense. Your superintendent and other district administrators know best what procedures will and won't work; what specific requirements are necessary for the policy to succeed; and what requirements might be practical or unenforceable.

The Board can determine that new student evaluation techniques are needed, but the Board as a body cannot develop the alternate assessment strategies that will turn goals into reality. Similarly, the Board might determine that fees charged to groups using school facilities should increased. But the Board should not proceed to figure how much to charge each group or new fee formulas. The "how to" should be developed by the administration, subject to Board review.

At times a regulation will be entirely mechanics and administrative detail; if so, the Board need not specify its content. Nor is there any reason for the Board to put this type of regulation through a formal approval or adoption process. Many regulations, however, will provide the crux of Board control — requirements basic to the policy. When this is so, the Board may want to outline points to be included in the regulation; and it will review and approve the draft through a formal approval process.

Many regulatory statements — requirements, procedures, prohibitions — require Board action to be legal and enforceable. Others need the Board's official stamp of approval to assure the school community (staff, students, public) that "this is what the Board wants." And when enforcing a regulation, often the superintendent, principal, or other administrator wants the specific authority of the Board solidly behind it.

It's not feasible to list all regulations on which Board action is necessary. Such a listing would be long and much depends on the content of the particular statement. Suffice it to say that the following would be included:

1. Regulations pertaining to student admissions; denial of admission; special placement; suspension and expulsion, and conduct that might lead to these actions; transportation privileges.

2. Regulations relating to staff salaries; increments; benefits; leaves and absences; evaluation; termination of employment.

3. Regulations pertaining to dealings with other Boards and agencies; with the public and community groups.

4. Procedures for hearings of any type and for resolving complaints and grievances brought by the public, parents, students, staff.

State laws vary as to the type of regulations a school Board *must* adopt, the rule-making authority granted *only* to the school Board, the rule-making authority a Board may delegate, the legal status of the superintendent, and the superintendent's powers and responsibilities. We advise you to check on these matters.

For many reasons, the Board and administration may want regulations as well as policies to appear in the school system's policy manual. Factors that may lead to this decision — and all other important decisions about the project of policy manual compilation — are set out in the next section.

Part II: Managing the Policy Manual

7
Project

Planning your Manual Project

Compared to the continuing process of developing new policies and regulations, the project of compiling the district's first policy and regulations manual—or reorganizing and updating an existing one—is one that can be accomplished in a specific length of time.

Many tasks will go into the project—searching minutes and other documents for policy and regulations, coding statements to a classification system, checking old statements against legal requirements, throwing out the old, inserting the new. A policy project has been called "cleaning the attic" and the term is apt.

Cleaning the policy attic requires research and work of a technical and editorial nature. It goes most smoothly when project objectives, and means and procedures for accomplishing them, are clarified with the school Board in advance.

Project Objectives

All projects have the same overall goal: to create a well organized manual in which policies and regulations can be located easily.

Specific objectives may vary, however, depending on the state of your current policy collection and the desires of the Board. Your objectives may be all or most of the following:

1. To identify and code all existing written and implied policies of the Board. (Note: Often policies are implied through actions taken by the Board. Usually a project includes putting such policies in writing for the first time.)

2. To identify and code all existing regulations designed to implement policy. (As used here, "regulations" means system wide regulatory statements. Such statements may be known locally as district "rules" or "procedures.")

3. To separate Board policies from regulations.

4. To identify and eliminate statements that are obsolete or trivial.

5. To identify and reconcile statements that contradict each other.

6. To identify and eliminate statements that are in conflict with law or with terms in agreements negotiated with staff units.

7. To provide such editing as may be necessary to achieve clarity, coherence, and good writing style.

8. To provide, as appropriate, legal references and references to items in negotiated agreements.

9. To identify areas of concern not covered by policy and/or

regulations, and to prepare recommendations for the Board.

10. To complete the entire project in _____ months. (Note: Time required will vary with the condition of the policy collection and with other responsibilities of the persons to whom project tasks are assigned. Anything less than six months for the work is unrealistic.)

Who Will Do the Job?

There are certain advantages in having an outside consultant compile, or update and reorganize, a policy manual; others in having the work done in-house. For example, an outside consultant will be able to look at policy materials more objectively and will be experienced in manual compilation, including coding to a classification system. In contrast, an administrative staff member will be better acquainted with district problems and the way the school system actually operates. Whether to have a project carried out "inside" or "outside," however, often is made on the basis of costs and on the availability of an administrator to do the job.

The project director, or editor, whichever you choose to call the person given the assignment, should be an experienced and capable member of the administrative staff. Unless the superintendent takes on the job (some do), the project editor reports directly to the superintendent, who will review and approve plans, procedures, and manual drafts.

The person assigned as editor should have:

1. A clear understanding of Board and administrative functions.

2. Appreciation and understanding of the purpose and logic of the policy classification system.

3. Ability to write clear, concise prose. Technical editing is an important part of a project.

The project editor will need clerical and typing assistance, perhaps help with research, and the cooperation of all administrators.

An outline for a project budget is offered in the accompanying box for your use in determining the total cost of a project done in-house.

It is recommended that the Board be consulted as certain major decisions are made about manual organization, content, and format, but that neither individual members nor a Board committee take on the project tasks. First, the work does not fall in the area of "school governance"; it is technical and detailed staff work. Second, it is more important for Board members to use their energies dealing constructively with current problems and planning ahead than to take on the tasks of researching, codifying, and editing existing policies. The Board's focus, in other words, should be on the policy development process—not the specific tasks of an approved policy manual project.

Choosing a Coding System

Ordinarily, a decision to use the NEPN policy classification system, or any other system, would be cleared with the school Board before manual compilation starts.

The *School Board Member's Guide to Policy Development*, Section 5, offers a checklist entitled "Criteria for Choosing a School Board Policy Classification System." The administration might consider the criteria presented in recommending a system.

Parts II and III of this Guide are written for school systems that will carry out a policy manual project without outside assistance. The instructions given are based on sound procedures used in compiling school policy manuals.

Although this Guide is prepared particularly for school districts that

use the NEPN policy classification system, the suggestions in it—except for those in Part III on using the system and on coding—are applicable to other systems. If the system you are using has been found lacking, however, selection of a system that will work is basic in a policy manual project. Or, if you are using a system developed before 1975, a switch to the current NEPN policy classification system would be advisable the next time your policy manual needs a general updating.

Outline for Project Budget

In estimating staff time needed, examine Section 8 of this Guide, "From Policy Search to Finished Manual," and consider the amount of time needed by each member of the project staff to complete each step. Consider a "day" as seven to eight hours spent on project tasks; "day" does not relate to calendar days, for in most cases assigned staff members will be able to devote only a portion of the working day to the project.

Staff Time—Indirect Costs

1. Project Editor
    _____ days @ _____ per day $ _____

2. Research Assistant
    _____ days @ _____ per day   _____

3. Word Processor
    _____ days @ _____ per day   _____

Materials

1. Binders for manuals
    (Consider who will receive
    copies—see Section 5.)   _____

2. Supplies—paper, file folders,
    general office supplies.   _____

Printing

1. Photocopies of working documents   _____

2. Printing of completed manual   _____

TOTAL ESTIMATED COST $ _____

Basic Decisions about Content

It's well to make some basic decisions in advance about manual content. These decisions concern the inclusion of (1) job descriptions, (2) related items from negotiated agreements, (3) information from law, (4) procedural detail.

1. Will you include job descriptions?

Most school systems have many job descriptions—20, 30, 50, and up. Including all may make your manual unwieldy, or perhaps run to several volumes. Therefore, we recommend that job descriptions be compiled in a separate manual. Those for key positions also might be included in the manual—for example, those of the superintendent, and no doubt principal and classroom teacher.

2. How will you treat related items in agreements negotiated with staff?

In school systems that negotiate with staff, many personnel

policies must be read and interpreted in the light of items that have been agreed upon with staff bargaining units. Additionally, many districts, on the basis of unwritten policy, extend benefits provided for in negotiated agreements to those full-time employees (perhaps administrators, managers, confidential personnel) not in bargaining units. Although it's handy to turn to a policy on personal leave, for example, and read both the Board policy and negotiated item on the same page, including items from negotiated agreements in a manual makes it difficult to keep up to date.

We therefore suggest that only references to contracts be provided on policy pages—unless your negotiator or attorney counsels otherwise. Entire contracts sometimes are included as appendices at the back of the manual.

3. Will you include state law and regulations?

Certainly, you'll not want to present the entire law covering most topics. Yet certain basic information about how the Board and district operate may be entirely state law—for example, the term of Board members, the way they are selected, open meeting requirements. This basic information should be in the manual, and presented in a way that distinguishes it from policy content that the Board may change at its option.

Throughout the manual, of course, portions of the law may be mentioned or quoted in either policies or regulations. We suggest, however, that where state law and regulations bearing on a topic are extensive, you note the existence of legal requirements and give legal references rather than quoting long sections of law.

4. Where will you draw the line with procedural detail?

To operate effectively, a school system must have many procedures and rules in writing—for students, for staff. At what point do details become too low gear for inclusion in a district manual?

In advance, you might draw up general rules of thumb for what will and will not be included. For example:

Include system wide regulations offering rules and procedures that affect all or most staff and students, but do not include rules and procedural details that pertain to the staff or students of only one of several schools operating at the same level; do not include what would be considered "building rules" or "departmental rules."

Handbooks for departments, students, or categories of staff will contain a mixture of Board policy, district regulations, building or department rules, and general advice. Such handbooks may be referred to on policy pages for informational purposes.

5. What exhibits will you include? In fact, what are exhibits?

Exhibits (in the NEPN sense of the word) are useful informational documents related to policy: They may be forms, criteria lists, informational outlines. If you go overboard including this type of material in your manual, you'll end up with overstuffed binders.

Our recommendation is that you scan forms and the other types of materials mentioned for policy (they are a good source of unwritten policy) and extract it for use in policies (or regulations). Include only the most important in the manual as exhibits—these may be staff evaluation forms, application forms for community use of school facilities, field trip permission forms.

Another tip about exhibits: They are inclined to go out of date fast, and need to be checked carefully for currency annually. If you treat important but temporary material as exhibits, the special color chosen for exhibit pages will alert the person maintaining the manual to the need for checking the pages carefully each year.

Decisions About Format

Most of your important decisions about manual format will have been made if you have selected the NEPN school Board policy classification system, for the system calls for:

1. A *loose-leaf manual*, so that it may be easily maintained.

2. *Color coding*, so that policies, regulations, and supplementary documents (exhibits) will be immediately distinguishable. However, one important question about manual format remains:

Will you use a separate manual for regulations?

Some school systems do. But most file both in the same manual; policy first, then regulation. There's a good reason to go along with this majority decision: a policy and its implementing regulations usually need to be read together; it's a nuisance for Board members, administrators, and others to have to look up the information they want in two manuals.

Other decisions need to be made about page format and writing style—but these can be made by the editor and superintendent after the project gets underway.

Progress Reports, Clearances

Advance planning should include general procedures that will be used in clearing the newly compiled manual with the Board. For example:

Will a draft of the entire manual be completed and then presented to the Board for examination and approval? Will the draft be presented in two or three phases, or perhaps section by section?

It's easier and more efficient for a project editor to work through a draft of the entire manual before presenting anything for Board approval. If a review is to be accomplished in phases, reviewing together sections A through C; D through F; G and H; and I through L works out well.

When Board review is scheduled after completion of an entire draft (which may take months), it is advisable to schedule periodic progress reports, at which time serious policy gaps might be brought to the Board's attention. There is no reason for the Board to postpone work on needed new policy just because manual compilation is in progress.

With these major decisions made, you are ready to begin the research and editorial tasks of a policy manual project. These

8

outlined in the following section.

Project Tasks: From Policy Search to Finished Manual — And its ~~Maintenance~~

This section outlines for the project editor the research, technical, and editorial tasks that go into compiling a codified manual. The procedures detailed have been found to work well in many school systems.

1. Identify and collect source documents.

Work with other administrators to identify district documents in which you expect to find written and implied policy and regulations. The following documents will be important:

a. Any policy and/or regulations collection on hand (even though out of date).

b. Any separate collection of Board bylaws.

c. Board minutes since _____ and attachments that relate to policy.

Minutes and appended materials (except routine listings) are a primary source of both stated and implied policy, but it doesn't pay to delve too deeply into the past. A careful search of minutes for five years often is sufficient to uncover current policy. Recently reorganized school systems usually search minutes back to the date of reorganization; school systems updating a manual usually search back to the date of the last manual revision.

d. Current agreements with staff negotiating units.

If a school system negotiates with staff, these are essential for updating personnel policies; any conflicting statements in a policy must be removed.

e. District handbooks, if any, for administrators, teachers, students, parents.

If there are no system wide handbooks, collect up-to-date school handbooks.

f. Job descriptions for key positions.

Even though you do not plan to include job descriptions in the manual, look them over for policy and important regulations. One or two paragraphs in a job description may contain the only school system policy or regulation on an important topic.

Many important documents may be published in separate form or they may be scattered in central office files. Consider, with other administrators, where you will find, for example, written information on: Board advisory committees; staff evaluation; budget development; purchasing; student transportation; special education; vocational education; summer programs; adult education; student admissions; student discipline; interdistrict cooperative arrangements. (Check through the NEPN classification system to get ideas on other statements that may be hiding in files.)

When you collect the materials, collect two copies of each document—three if the document has print on two sides.

2. Search and code documents.

A research assistant, working under close supervision, can help you with this task. The coding needs to be consistent document to document, and should be done in accordance with the general principles underlying the classification system and instructions for using it.

In coding to the NEPN classification system, use the instructions in Part III of this Guide and the other NEPN materials that you have available.

Start by searching the materials you think will be most lucrative in terms of policy and regulations, probably the Board minutes or a policy collection.

Read through each document. When you come to a passage that you consider policy or regulation—or otherwise important for your editing purposes—code it by topic in accordance with the classification system. Mark the passages and codes right on the margin of the document.

In searching minutes, it helps to start with the most recent minutes and work backward chronologically. In this way you avoid coding much out-of-date material.

During the search-code process, it's not necessary to make a separation between policy and regulation—that can wait for the editing. As for the editing, don't start until the entire search and the step described immediately below are completed.

3. Collate marked passages by code.

As the coding of each document is completed, turn the document over to a clerk with instructions to proceed as follows:

a. Use another copy of the document and cut out the coded passage.

b. Paste the coded passage on an 8 1/2 X 11 sheet of paper, using as many sheets as needed and stapling them together.

c. Enter the code at the upper right-hand corner of the first sheet.

d. Use the NEPN classification system to get the heading (descriptor) for the code, and write it at the top of the coded passage.

e. Note the source document and page number(s) at the end of the clipped passage: give date if from Board minutes.

When all documents have been processed as above, the clerk should collate all sheets in alphabetical order by code, clipping sheets bearing the same code together. The material should be placed in 12 file folders labeled A through L (one folder for each major category of the classification system).

Note: It's important to caution the clerk not to cut up the original coded document. This should be preserved intact so that you may refer to the context of a clipped passage.

4. Check, delete, edit.

The most efficient editing procedure is to start with Section A and work code by code, section by section, in a systematic, organized fashion. The orderly arrangement of the classification system provides a good structure for the work.

Here's an editing routine that works well:

a. Before starting each major section, review all passages that have been collected for the section and recheck coding. Get an overview of contents for the entire section.

b. As you work from code to code, check each topic, and the passages collected for it, against state law; check passages clipped from negotiated agreements against other passages. Note conflicts.

c. Separate policy and regulatory content; edit policy first. On edited drafts, distinguish regulations from policy by adding — R after the letter code. Add —E after code on exhibits.

d. In editing, delete the outdated and inconsequential, resolve conflicts, and rewrite as necessary so that the statement will

be clear, coherent, and concise. Often you will need to consult with colleagues so that the edited draft will reflect the actual practice of the school system. You should feel free to make changes in wording for the purposes of accuracy, clarity, and coherence (this is an editor's function), but you are not free to make changes that would alter the Board's philosophy and the school system's way of doing things. Such changes are subject to the Board's policy development process.

Shortly after the editing starts, take time to develop a style sheet and page format for your manual. Consistency in capitalization, punctuation, spelling, etc., will greatly enhance your manual and such details are most easily taken care of as you go along. The page format should establish typewriter face, margin widths, style and locations for entering adoption and approval dates, legal references, cross references, etc. It should also set up a standard location for entering the name of your school district on each page.

5. Type and duplicate draft.

When editing is completed, turn the copy over, along with the style sheet and page format instructions, for final typing of master sheets or other processing for duplication. The pages then should be duplicated in the quantity needed for review, with policies, regulations, and exhibits reproduced on sheets of different color in accordance with your color-coding scheme. A final step will be collating the pages for each "review manual" in order.

6. Review draft manual.

Ordinarily a draft manual is reviewed twice: once by the superintendent and management team, then by the school Board. In between reviews, the draft is corrected and another round of duplication ensues. If the superintendent, division and department heads have been consulted regularly during the editing process, however, one review may be all that is necessary.

The project editor should sit in on all reviews, taking such notes as needed to make agreed-upon corrections.

You need to make the purpose of a draft manual review very clear: the objective is to check the statements for accuracy. Does the statement reflect current Board policy and current school system practices? If this is not understood, you will have your reviewers developing new policy and regulations that may call for extensive changes in school system programs and operations.

Reviewers should, of course, flag current policies they think should be changed. They should flag entire topics on which the Board has not taken policy action but should. They may even prepare proposed policies to reflect inadequacies in the Board's current policy collection. But they may not write new policy into the policy manual: only the Board can do this through its policy development process.

Recommended policies should be presented to the Board for official action separately from the collection of existing policies that is being edited during the policy manual project. (Note: This is not necessarily true of regulations. The superintendent may have authority to issue regulations in many areas independent of Board action.)

7. Final touches and production.

Before printing your final manual, you will add such corrections as have been agreed upon during the review. You also should:

a. Draft and have approved an introduction to the manual. This should include information on how to use the classification system and index for finding the information desired.

b. Include standing instructions about inserting new material as received, and deleting old material as directed.

c. Add a prominent note to the effect that the manual is the property of the school Board and is issued the holder on a loan basis.

8. Present manual to Board.

Arrange for presentation of the manual to the Board at a public meeting. No doubt the superintendent will formally present the manual, along with the recommendation that it be accepted as an accurate compilation of current Board policy and district regulations, with each statement subject to change at a later time through the Board's process of policy revision and adoption.

Because the compilation does not contain new policy and regulation, there is no need to put each statement through an adoption process. However, the final manual should contain the date (written in by hand if necessary) that the new manual was accepted by the Board.

Unless all Board members have become well acquainted with the manual's organization during a review of the draft, the project editor should explain the manual's organization and the procedures used in compiling it.

9. Present recommendations.

As compilation and review of the manual proceeded, the project editor, administrative team, and Board members will have noted the need for new policy and substantive changes in policy. The classification system will have alerted them to gaps; certain policies in the manual will appear to be in dire need of regulations; policies to cover certain regulations will be conspicuous by their absence.

Usually an assignment to assemble sample policies and develop new policy drafts goes with the job of project editor. When so, the editor's work on policy recommendations can proceed in tandem with manual editing, section by section, code by code even though these recommendations will be fed into the Board's policy development process rather than presented to the Board as part of the project of compiling its current policies.

Some recommendations can be presented to the Board as the work goes along. If the adoption process goes smoothly, these policies will appear in the manual when it is presented to the Board.

There is a danger, however, when Boards and editors postpone manual compilation, review, and completion until the Board acts on all recommendations for new or revised policies. The only answer is to proceed with the manual and set aside recommended changes. It is best, in other words, to keep approval of the policy manual project separate from the process of approving new polices. Our recommendation: At the time the newly organized manual of existing policies is presented to the Board, submit a separate list of recommended policy changes.

l0. Distribute manuals.

Your plan for manual distribution should make it possible for anyone concerned with Board policies and regulations to have access to them—staff, students, parents, the press, public officials.

Your distribution list might include: (1) Board members; (2) central office administrators; (3) principals; (4) staff libraries; (5) secondary school library(ies); (6) public library(ies); (7) heads of employee organizations—and perhaps heads of certain staff or lay advisory committees; (8) the mayor's office; (9) media representatives.

It is important to number all manuals, and to keep a list of the persons to whom manuals are issued (by manual number and name).

Do send a copy of your new manual—and copies of new policies and regulations as issued—to the NEPN/NSBA Policy Information Clearinghouse, 1680 Duke Street, Alexandria, VA, 22314. It is through the cooperation of school systems in sharing their materials with us that we are able to fulfill requests for up-to-date sample policies and regulations on hundreds of topics.

Manual Maintenance

All the work that goes into policy development and manual compilation will be for naught if an administrative staff member isn't made responsible for setting up central office policy files, keeping the manual up to date and, in general, administering the manual system.

Your policy files can be set up while the project is in progress. The purpose of the files is two-fold; one, to hold the master copies of all statements in the manual (unless the "master" is preserved in some other way, as on computer disks) and extra copies for distribution as needed; two, to hold backup and resource materials. The latter include: statements in the same category that have been rescinded or revised (so marked): related legal information; professional articles and background information on the topic; sample policies on the topic that might be of use later. You will need file folders (one for each NEPN term in the classification system and for each term that you have added). Folders should be labeled by code and term.

The administrator assigned responsibility for manual maintenance will code and disseminate new material, provide instructions to manual holders, recall all manuals periodically and check them for accuracy.

This official "keeper of the policy manual" also may be asked to keep abreast of state law for policy implications and alert the Board to the need for new policy; to check current statements for possible conflicts when new policies are being drafted; to provide from the policy files histories on past policies when new and revised statements are being considered.

To make manual maintenance an easier task, some school Boards authorize the keeper of the manual to make policy revisions required by new law, court decisions, or negotiated contracts. When approved by the superintendent and accepted by the Board, such revisions become official without their going through the full process of policy development.

Applying Technology to Manual Maintenance

Can the benefits of modern technology be applied to keeping your policy manual up to date and accessible? The jury still is out. While school administrators are expressing a desire to link state-of-the-art technology to the policy needs of school systems, actual practice is limited.

Word processing is a starting point. Anyone who has used a word processor knows how efficiently and easily the technology makes corrections, revisions, deletions, and additions, and also produces a high-quality printed document. Some word processing equipment permits keying in standard phrases so that they can appear throughout all policies and regulations with uniform spelling and capitalization.

But computers can do even more than turn out perfect copy. With some systems, a computer search can locate all policies about a

chosen topic, or all places where a particular legal reference is provided, enabling a comprehensive look at the impact of new policy or law and where revisions are necessary. And, as some school systems are doing, alphabetical indexes (by code and by topic) can be set up easily.

As policy administrators become more familiar with computer

capabilities, it is likely that other benefits will evolve. There may come a time when printed copies of policy manuals become obsolete because the data will be accessible at computer terminals installed at all locations where printed manuals currently are available.

As one administrator commented, however, applying technology to policy management doesn't have a high priority because there are so many other things that need doing.

Policy Manual Audit

Use the following Policy Manual Audit to evaluate your policy manual:

I. PHYSICAL CHARACTERISTICS   YES NO

1. Each policy begins at the top of a page.

2. Each regulation is presented on pages separate from the policy.

3. Exhibits or supporting documents are presented on pages separate from policies and regulations.

4. Color coding is used to separate policies, regulations, and exhibits.

5. Policies, regulations, and exhibits are contained in looseleaf binders.

6. The entire binder or binders are not overfilled and are easy to handle.

II. CODIFICATION   YES NO

Policies, regulations, and exhibits are coded according to a tested and workable coding or classification system.

III. COVERAGE — Treatment is Adequate/Partially Adequate/ Inadequate

1. Policies and regulations exist for all major categories of school Board responsibilities and operation.

2. Major provisions of the staff-Board negotiated contracts are reproduced in the manual and are distinguished from other policy statements, or there are cross-references to contracts on appropriate policy pages.

3. Policies and regulations exist for most topics in which state officials currently have a special interest.

4. The process of policy development and revision is stipulated or described in the manual.

5. Board policies are in harmony with clauses in the negotiated agreement(s); and conversely, clauses in the agreement(s) conform to Board policy.

6. The policy manual contains legal references and, where necessary, legal information to support or clarify policies and regulations.

7. The manual does not contain contradictory statements.

IV. RELEVANCE   Treatment is Adequate/Partially Adequate/ Inadequate

1. In general each policy statement covers important concerns

and points related to the topic.

2. The manual excludes unnecessary information, minor procedural detail, and irrelevant statements of opinion or fact.

V. TIMING AND UPDATING   YES NO

1. All policies and regulations carry the date of adoption, revision, or reaffirmation.

2. Most major policies have been adopted, revised, or reaffirmed within the past three to four years.

3. Policies and regulations that have been rescinded, supplanted by others, or amended have been deleted from the manual, and the newer policies included.

VI. PRESENTATION   To a large extent/To some extent/ Inadequately

1. Most policy statements are presented in a manner that makes clear the Board's philosophy, beliefs, expectations, or aspirations.

2. Most major policies reflect the Board's concern for children, the teaching and learning process, and home-community interests.

3. Most policies are stated in a positive tone.

4. Policies are presented so as to give the administration direction to develop regulations for policy implementation.

5. Policy statements usually are paralleled by regulations.

6. Regulations usually are presented on the basis of adopted policy.

7. References to law are presented when appropriate.

8. Cross-references are given to related policies and regulations.

VII. RETRIEVAL   YES NO

1. The manual includes an index or other instrument for quickly locating desired policies and regulations.

2. New policies and regulations are inserted, and old ones removed as promptly as possible.

3. Copies of the manuals are made available and accounted for in accordance with a distribution plan approved by the Board.

4. The Board's plan of distribution of manuals includes, at a minimum, Board members, key members of the administration, staff representatives, the school library, and the public library.

5. All policy manuals are called in once a year for review and updating.

Part III: Using the NEPN Policy Classification System

9

A Look at the System's Structure

This section and the one that follows offer a guide to the NSBA/NEPN system for codifying school Board policies and district regulations. As you read it, keep the NEPN Reference Manual you are using nearby and refer as necessary to the classification codes.

The system is contained in 12 sections, or chapters, as follows:

A Foundations and Basic Commitments
B School Board Governance and Operations
C General School Administration
D Fiscal Management
E Support Services
F Facilities Planning and Development
G Personnel
H Negotiations
I Instruction
J Students
K School-Community-Home Relations
L Education Agency Relations

Each section has its own family of subcategories — that is, subcodes and terms called "descriptors" that provide suggested titles for policy statements. The subcoding also is by letter. Letter coding offers two major advantages over numerical systems: 1) it is more expandable in that the codes have available 26 separate letters to use compared to only ten digits of numbers; and 2) it requires no decimal points, a feature that tends to reduce the likelihood of copying and filing errors.

Anyone can quickly learn the structure and logic of the system. For example, look at the lists below showing the first few major categories (two-letter codes) that appear in Sections A and B. Except for the governing letter for each section (A for "Foundations and Basic Commitments" and B for "School Board Governance and Operations"), the code letters in the left-hand columns appear in alphabetical order.

AA	School District Legal Status
AB	The People and Their School District
AC	Nondiscrimination/Equal Opportunity
BA	School Board Operational Goals
BB	School Board Legal Status
BC	School Board Member Conduct
BD	Organization of the School Board

The alphabetic order begins anew for subcategories. Consider, for example, the term "School Board Meetings" and its subcategories:

BE	School Board Meetings
BEA	Regular Board Meetings
BEB	Special Board Meetings
BEC	Executive Sessions/Open Meetings (also KBA)
BED	Meeting Procedures/Bylaws

BEDA	Notification of Board Meetings
BEDB	Agenda
BEDC	Quorum

You'll see from these descriptors — policy headings — that a simple and logical outline is being presented, although the descriptor sequence shown here for school Board meetings is by no means complete. The order in which the terms appear in the classification system does not imply importance; the order establishes a logical sequence for filing policies and regulations.

There are over 650 letter codes and almost as many descriptors in the classification system. There's a difference in the totals because some descriptors appear in the system twice, in different sections, when the descriptor covers a policy topic essential in both major areas.

For example, public participation in school Board meetings is located both in Section B and in Section K, just as a policy on tobacco-free or drug-free schools may be placed both with Sections A and G and sometimes J. This is because these policies have a particular impact — and sometimes require focused regulations or policy provisions — for staff or students. Nonetheless policies in these areas are of such importance and have such wide ranging — although variable — impact that they are appropriately placed in Section A, Foundations and Basic Commitments, as well. The "also" next to a descriptor means that a similar policy or regulation also is filed in the other location. The 6th Edition incorporates less duplication, or "Also's", than in the past.

The classification system was designed for expansion and adaptation to local use. New descriptors and codes can and should be added to accommodate the special policy needs of local school systems and new policy concerns brought with the changing times.

The system calls for the use of the letter symbols -R and -E following letter codes to distinguish regulations (-R) and exhibits (-E) from policies. Color coding of the paper also distinguishes; policies are white, regulations are yellow, and exhibits are blue.

Before attempting to use the system for coding policies and other materials, you should get acquainted with the major sections by scanning the classification pages. Note, too, the general principles and special techniques discussed in the following section.

Highlights of Changes in 1991 edition of Reference Manual

Section A/Foundations and Basic Commitments

Add major categories of discrimination such as sex, ethnicity/race, age, religion, and handicap (ACA-ACG).

Add significant system wide school objectives such as Tobacco-Free Schools (ADC), Drug-Free Schools (ADB), Safe Schools (ADD), and Effective Schools (ADE).

Add School District Mission (AD), Accountability (AE) and Goal/Outcome-Based Education (AEA)

Section B/School Board Governance and Operations

Add School Board Liability (BBC)

Add School District Logo/Motto (BHA)

Section C/General School Administration

Add principals/building administrators (CFA/CFB).

Add Site- or School-Based Management (CFD) and School Climate (CFE).

Add Elementary and Secondary School Administration.

Section D/Fiscal Management

Add Credit Cards (DGD) and Personal Debts of Employees (DGE)

Section E/Support Services

Add Environmental and Safety Program (EB).

Move First Aid from Section E to Section J, Students.

Add Waste Management and Recycling (EDE)

Add Graphic Arts Services to Printing and Production, EGAC.

Add Electronic Mail and FAX to Mail and Delivery Services, EGAE.

Add Use of Technology in Office Services

Add Self-Insurance/Insurance Pools to Insurance Program/Risk Management, EI.

Section F/Facilities Planning and Development

Add Facilities Renovations/Improvements, FJ.

Section G/Personnel

Distinguish among the three major categories of school personnel, certified (teachers); administrative; and support/classified.

Add Drug-Free Workplace and Tobacco-Free Workplace.

Add Employee Assistance/Wellness Programs (GBGC).

Add Merit/Performance Pay under each staff category.

Add specific reasons for personnel leaves and absences, e.g., parental, legal, religious, sick.

Section I/Instruction

Add specific instructional approaches under IF, e.g., Heterogenous/Ability Grouping, nongraded Education.

Add Year-Round School, ICC.

Add specific curriculum areas under Basic Instructional Program, IHA, e.g, English/Language Arts, Mathematics, Social Studies.

Add Programs for At-Risk/Disadvantaged Students, IHBC. Move Home Schooling, IHBG, from Section K to Section I.

Add Early Childhood Education, IHBI.

Add Child Care Programs, IHCF.

Add specific Instructional Arrangements under II.

Add specific types of instructional resources under major curriculum areas.

Add Resource/Media Centers to School Library, IJMC

Add Technology Resources, IJMD

Revise language under Academic Achievement, IK, and Evaluation of Instructional Programs, IL, to incorporate idea of assessment.

Section J/Students

Add School Choice/Open Enrollment, JFB.

Add use of Beepers in School, JICJ

Move Student Activities from Instruction, Section I, to JJ.

Add Students with HIV/AIDS, JLCCA

Move First Aid/Emergency Medical Care from Support Services, Section E, to JLCE

Add Student Information, JR, and related categories of Student Lists, JRB, Release of Information on Students, JRC, and Student Photographs, JRD.

Add At-Risk Student Behaviors, JLDB, and related topics of Identification, Interventions, and Post-vention Procedures for Student Problems, JLDBA, Self-Esteem Promotion/Suicide Prevention, JLDBB, Peer Counseling, JLDBE, and Mentor Teacher/Caring Adult Program, JLDBF.

Add Child Abuse/Child Protection, JLF.

Add Homeless Students, JLG

Section K/School-Community-Home Relations (Section title has been changed to reflect importance of home relations and parent involvement.)

Add Parent Involvement, KB, Parent Rights and Responsibilities, KBB, Communications with Parents, KBD.

Add Crisis Management/Communications, KDE.

Change policy headings with "complaints" to "concerns/complaints," KE

Add School Ombudsperson/Parent Liaison, KEE.

Add Business and Industry Involvement in Education, KG. Add Advertising in Schools, KHA.

Add Child Care Providers, KJH.

Add Relations with Senior Citizens, KJI

10

Coding: General Principles and Special Techniques

In this section we offer some general principles that should be observed in coding to the NEPN classification system, some special coding techniques, and tips for solving coding problems.

Although the term "policy" is used throughout this section, the instructions and suggestions apply equally to regulations.

Code to the System

A policy classification system is designed, first and foremost, so

that policies can be easily and quickly located. Persons using a manual rely on you, the policy coder, to code policies correctly in accordance with the system. This is especially true if you are using the preprinted NEPN classification sheets and preprinted Code-Finder Index in your district manuals. Although the NEPN classification system is adaptable and expandable, making unnecessary changes and additions will lead to confusion.

Aim First for the Ballpark

A first consideration in coding is that policies be filed in the appropriate major sections. Your manual users will expect to find personnel policies in the G Section (Personnel), student policies in the J Section (Students), etc.

Hasty coding won't do. Coding a policy from the title that happens to be on it without reading the statement often leads to error. For example, a policy bearing the heading "Dismissal" might deal with one of several quite different things: dismissal of students before the end of the school day; dismissal (expulsion) of a student; dismissal (firing) of an employee; school dismissal hours; or the emergency closing of schools on snow days. Depending on content, that statement might go in the Students, Personnel, or Instruction sections, or with policies under Emergency Plans in the Support Services section.

By reading the statements you are coding carefully, you will get in the right ballpark and then will be able to locate the index entry that will lead you to the proper code and descriptor.

Use the NEPN Descriptor...But

Using the descriptors in the standard NEPN system is important if manual users are to locate policies quickly and easily. For example, if the Board has a policy on "snow days," title it "Emergency Closings" in accordance with the system.

There are special cases, however, when changes in the standard terminology are necessary. For example, if support staff personnel are known throughout your school system and state as "noncertificated personnel," use the term Noncertificated Staff rather than Support Staff for all descriptors in the GD portion of your manual. Similarly, if the chief school administrator is known as the "district director" (as in many vocational districts), use that term rather than "school superintendent" for the descriptors pertaining to the chief school administrator.

The terminology used in the NEPN system was selected to serve the majority of school systems in the country. In most instances, the system will serve you best if you use the standard descriptors, but change them if you think change essential.

Choosing Between Descriptors

At times you will need to choose between descriptors and codes for a policy. There are several reasons for this and several solutions.

- For example, you may have a policy that combines statements on regular and on special Board meetings. The classification system shows three codes involved:

  BE   School Board Meetings
        BEA Regular Board Meetings
        BEB Special Board Meetings

For proper coding, your choices are to (1) separate the portions pertaining to the two types of meetings and code each portion as appropriate, or (2) put the entire statement under the broader term. School Board Meetings, code BE.

Because the classification system is in outline form, you will need to make this type of decision fairly often.

Your manual users should be advised to look up the classification system for the broader, covering term if they cannot locate a policy under the specific term where they might expect to find it.

- There is another solution when you are choosing between codes and descriptors that appear consecutively in the classification system. Take, for instance, a policy that covers the form of the Board's agenda, the order of business, and preparation and dissemination of the agenda. Here codes and descriptors may be combined as follows to cover the entire statement as it stands:

  BEDB/BEDC   Agenda/Quorum

Unless the descriptors appear consecutively in the classification system, don't combine them—if you do, you will lose the file location for policies that should be filed in between. For example, a policy coded and headed "BED/BEDB, Board Meeting Procedures/Agenda" would leave no location in your manual for a policy coded and headed "BEDA, Notification of Board Meetings."

- As the most important example, you may have a policy that combines the Board's position on two quite different although related topics—for instance, selection of textbooks and dealing with complaints about textbooks. You will find the following codes and descriptors in the classification system:

  IJH   Textbook Selection and Adoption
  KEC Public Complaints about Instructional Resources

A policy classification system and successful policy manual compilation are based on the principle that a policy or regulation will cover one important topic. It's essential to observe this principle if statements are to be retrieved through use of the classification system. So the solution in coding a statement that combines two or more distinctly different topics is to separate the various portions and code each portion in accordance with the classification system (but note the paragraph that follows).

- Here is a related headache for a coder. A policy touches on three, four, or more topics that appear as categories in the coding system. For example, a statement has elements that concern:

GBA	Equal Employment Opportunity
GCEC	Posting and Advertising of Professional Staff Vacancies
GCK	Professional Staff Assignments and Transfers
GCQA	Instructional Staff Reduction in Force

If the statement as a whole amounts to more than the sum of its parts, it won't do to take it apart and present it in sections here and there in the policy manual. Instead, select the category where the burden of the policy is heaviest, and use cross references to that category from the other codes. Do this even if you must insert a page bearing only the code, descriptor, and cross reference.

Cross References Can Help...Or

As you code policies to a classification system, you will find many that are related in content. A policy on public complaints about textbooks will have a relationship to a policy on textbook selection and adoption. A policy on teacher evaluation may refer to teacher tenure; a policy on the public's right to know may refer to executive sessions.

It will help users of your manual if you provide cross references in

such cases—providing that the content of the policy referred to has an important bearing on the policy they are reading. Otherwise, the cross reference will be a nuisance.

Breaking Out New Terms and Codes

The NEPN classification system calls for breaking out (adding) local terms and new codes for certain types of statements—for example, policies pertaining to particular instructional programs, to various types of staff leaves and absences. Suggestions for many other possible "break-out" terms and codes are offered in the *Code-Finder Index* and in the last section of this guide. Break-out terms and codes added unnecessarily, incorrectly, or illogically, however, will confuse people using the classification system and index to find statements.

To avoid unnecessary additions, make a diligent search in the *Code-Finder Index* to be sure that you have not overlooked a standard NEPN term and code before you make an addition. Then, if you find that an addition is needed, seek the most logical location in the system where the new term may be added without taking over a letter code that already is assigned a standard descriptor in the system.

Example: You wish to file a new policy on competency testing. You find the term "Grading/Assessment Systems" in the classification system (in Section I, Instruction). Under the category are three subcategories:

JKA	Testing Programs
IKAA	Tests and Examinations
ILB	Test Administration
IKAB	Report Cards/Progress Reports

The correct break-out code for your policy will be:

IKAC*   Competency Testing.

The Code letters IKAA and IKAB already are assigned to other descriptors in the standard NEPN system and are "off limits" for use as break-out codes for good reasons. If, for example, you use code IKAA for your policy on competency testing, you will be taking over the file location for a policy on Tests and Examinations, and then would have no location for a policy on that topic. Moreover, the standard classification sheets and index will not work for your manual users insofar as code IKAA is concerned.

When you use a break-out code, identify it with an asterisk to indicate that it is not in the standard classification system. Also, include in your manual a listing of all terms and codes you add to the standard system.

Coding Job Descriptions

Whether you want to include job descriptions in your policy manual is a question discussed in Section 7 of this guide. Assume that you do wish to include the superintendent's job description and those of certain other key positions.

The superintendent's job description might be regarded as policy. It is sure to establish Board responsibilities and set general guidelines for administering the school system. Other job descriptions will be more specific; most will fall into the category of "regulation."

The NEPN classification system calls for filing all statements pertaining to the superintendency in Section C (Administration). The superintendent's job description is properly filed under code CB, School Superintendent.

Job descriptions for key professional staff positions can be assigned break-out codes and descriptors under GCA, Profes-

sional Staff Positions. Job descriptions for key positions in the support staff would be coded and filed similarly under GDA, Support Staff Positions.

Coding Policies on Advisory Committees

Most school systems have an assortment of statements on committees and councils composed either of citizens, teachers, administrators—or representing two or three of these groups—serving them in various capacities. Here are suggestions for coding such statements so that they may be found easily.

For policies that deal with committees composed largely of citizens serving the school system or individual schools in a broad capacity, use Advisory Committees, BDF. For advisory committees that serve in special capacities, use a descriptor that relates to the committee's function—thus Facilities Planning Advisers, FBA, for a building committee; Occupational Education, IHAIA, for a vocational-technical education committee: Programs for Handicapped Students, IHBA, for a special education advisory committee.

For advisory groups composed only of administrative personnel, use Administrative Councils, Cabinets, and Committees, CE.

For a staff committee (of teachers only or of teachers and administrators) serving in a broad capacity, use Staff Involvement in Decision Making, GBB. If the committee serves in a limited area, use a descriptor that relates to the committee's function—for example, use IG, Curriculum Development, for curriculum committees.

For school councils or committees established for the purposes of site- or school-based management — going beyond an advisory and into a decision-making capacity — use Site- or School-Based Management, CFD.

Note: At times you may wish to break out a new descriptor under the code suggested for statements on the particular advisory committee or council.

Coding Techniques for Saving Space

Two coding techniques can help you keep a policy manual to respectable and practical size.

First, you often can use a major category to cover all or most of the topics called for in the subcategories. One example is Student Conduct, JIC. This might be used to file a policy covering all or most subcategories under that term (there are 12). But one big warning: If a policy would be "lost" filed under the major descriptor, by all means use the subcategory.

Second, you sometimes can combine descriptors and codes that appear consecutively in the classification system. This is acceptable when the consecutive descriptors deal with closely related topics and when the content of your policies under them also is closely related. Some examples of frequently combined descriptors and codes are:

BCA/BCB Board Member Code of Ethics/Conflict of Interest

JKD/JKE Suspension/Expulsion of Students

Do not combine codes and descriptors that aren't consecutive in the classification system—or the alphabetical order breaks down. And there's no purpose in combining codes unless doing so saves you a page in the policy manual.

11

The ABCs of Policy Codification

Here we offer section by section a guide for coding policies and regulations to the NEPN policy classification system. It is important to remember that how you use the classification system will depend on the policy style of your school board. Boards that prefer comprehensive policies — ones that cover several related areas at one time — often will use the main two-letter (descriptor) codes; ones that prefer having separate policies on each area will use more of the three- and four-letter codes. In some cases the general descriptor code would not be used if the more specific codes are used such as in Revenues from Tax Sources, DE. In other words, sometimes either the major policy code or the more specific codes is used — but not both. In other cases, it is advisable to have a general policy even if some of the specific categories are tapped, such as in Banking Services, DG. This will be indicated in each policy subsection by the sentence, "This code establishes a general category; some districts will want to use the following specific codes instead."

Remember you may not want to have a policy for each policy code. This decision depends on the particular needs of your school district and state.

In coding, use the Code-Finder Index and classification pages to locate appropriate NEPN codes; use this Guide for explanations of policy codes and for specific filing instructions. Refer to your Reference Manual for examples of coding.

As you code statements, also observe the general principles discussed in Section 10 of the Guide and make use of such special coding techniques as appropriate. Both policies, regulations, and exhibits are coded according to the same strategies. The following descriptions of the codes will only refer to policies.

Some of the significant changes made in this revision of the classification system were based on changes that school districts and state school boards associations were making in practice because of utility or logic. For example, policies relating to student extracurricular activities were moved from Instruction (I Section) to the Students (J Section).

Some codes were deleted because of duplication (e.g., having public participation at board meetings in both the B Section on School Board Governance and Operations and the K Section on School-Parent-Community Relations). Some school districts will want to have the policy in both sections in their own manuals. To promote visual simplicity and ease of use in finding specific policies, however, we have dropped many of these duplicate codings (although they will remain cross-referenced in the *Administrator's Guide*). Topics listed under school district mission, e.g., drug-free or tobacco-free schools, however, are listed under their respective policy sections, the areas most affected by implementation of the new program, such as Section G on Staff (Drug-Free Work Place) or Section J on Students (Drug and Alcohol Use by Students).

A — Foundations and Basic Commitments

This section contains policies on the district's legal role in providing public education and the basic principles underlying school Board governance. These policies provide a setting for all of the school Board's other policies and regulations.

AA   School District Legal Status

Use for an information statement telling exactly what the school district is in terms of legal name, description of its jurisdiction, geographic boundaries, and legal status. This category applies to the school district and should not be confused with policies relating to the school Board's authority, which are coded under BB, School Board Legal Status.

AB   The People and Their School District

Use for a statement on how the Board sees itself as an agent of the people, and the democratic principles that underlie its governance of the school system.

AC   Nondiscrimination/Equal Opportunity

Use for a statement concerning the equal and fair treatment of all persons — students, staff members, vendors, and others — in all aspects of the district's affairs. Special policies on nondiscrimination on the basis of sex, of handicap, etc. covering all persons can be referenced in one of the following codes. Policies pertaining only to staff or to students would be located under the appropriate G or J sections respectively.

ACA   Nondiscrimination on the Basis of Sex

ACB   Nondiscrimination on the Basis of Ethnicity and Race

ACC   Nondiscrimination on the Basis of Age

ACD   Nondiscrimination on the Basis of Religion

ACE   Nondiscrimination on the Basis of Handicap/Disability

ACF   Interpersonal/Human Relations

ACG   Resolution of Discrimination Complaints

AD   Educational Philosophy/School District Mission

Use for policies on the driving goals and basic philosophy underlying the school district's educational program. Statements on basic commitments and purposes also are housed here. School districts adopting long-range goals and programs affecting all phases of school life are identified in one or more of the following categories.

ADA   School District Goals and Objectives

Use for policies that, although general and all encompassing, are revised or reviewed periodically — or at least more often than the school district's philosophy or mission. The fruits of strategic planning are contained here, although the process relating to strategic or long-range planning is best described in Section B/School Board Governance and Operations (School Board Operational Goals, Special Meetings, or School Board Work Sessions and Retreats.

ADB   Drug-Free Schools

Use for policies describing the goal of having a drug-free school environment; however, locate a policy on Drug-Free Workplace under GBEC.

ADC   Tobacco-Free Schools

Use for policies describing the goal of having tobacco-free schools where no form of tobacco product is allow on school property at any time by any one; however, locate a policy on a tobacco-free workplace under GBED.

ADD   Safe Schools

ADE   **Effective Schools**

AE   **Accountability/Commitment to Accomplishment**

Use for policies that express the district's commitment to continued progress and improvement through a meaningful evaluation and assessment program as well as how the district's success in educating students are evaluated. Accountability goals and procedures should be clearly described and responsibilities assigned. State or federal accountability measures also should be located in this category.

AEA   **Goal-/Outcome-Based Education**

Use for policies describing a commitment to describing all phases of education in terms of achievable results. Policies in this category usually are cross referenced to areas of curriculum located in Section I, Instruction.

AEB   **Recognition for Accomplishment**

Use for a policy concerning Board recognition of exceptional achievements of citizens, students, staff members, or Board members. Do not use in place of Student Awards and Scholarships/JM.

AEC   **Accomplishment Reporting to Public**

Use for a policy on reporting to the public the progress or lack thereof toward district goals and objectives. Related categories include School District Annual Report/CM, Use and Dissemination of Test Results/ILC, and the Public's Right to Know/KDB.

B — School Board Governance and Operations

Section B contains policies on the school Board — how its members are appointed or elected; how it is organized; how it conducts meetings, and how the Board operates. This section also covers bylaws and policies establishing the Board's internal operating procedures.

BA   **School Board Operational Goals**

Use for statements on goals and objectives determined by the Board to guide its governance of the school district. These policies might include the process used in setting goals and priority objectives.

BAA   **Evaluation of the School Board/Board Self-Evaluation**

Use for policies relating to the goals and procedures enabling the Board to evaluate itself, for instance, how well the Board functions as a policy making group and the effectiveness of its policies in achieving goals.

BB   **School Board Legal Status**

Use for an information statement that describes the legal status of the Board as a corporate body and the origin of its authority. Include information as to the number of Board members and the term of office. Don not use in place of School District Legal Status/AD, School Board Powers and Responsibilities/BBA, or School Board Elections/BBBG.

BBA   **Board Powers and Responsibilities**

Use for policies on the authority and duties granted to the school Board as a legal, governing entity. This category either summarizes or lists comprehensively the Board's legal powers and duties. It refers only to powers of the Board as a whole and not to any matters relating to the authority of individual Board members, a matter that falls under a separate category in most cases so as to clearly differentiate them.

BBAA   **Board Member Authority and Responsibilities**

Use for a policy that defines the general responsibilities of Board members and delimits any authority Board members may have as individuals. However, don't use in place of School Board Member Conduct/BC.

BBB   **Board Membership - Elections/Appointments**

Use for policies relating to all matters relevant to the process leading up to an individual joining the Board. This code establishes a general category; some districts will want to use the following specific codes instead:

BBBA   **Board Member Qualifications** (include financial disclosure if required)

BBBB   **Board Member Oath of Office**

Include an appropriate exhibit with the oath.

BBBC   **Board Member Resignation**

Use BBBC for policies on a Board member voluntarily leaving a seat on the Board and BBBD for information how a member is removed by others, e.g., by the Board or by the public.

BBBD   **Board Member Removal from Office**

BBBE   **Unexpired Term Fulfillment/Vacancies**

BBBF   **Board Candidates**

BBBG   **Board Elections**

BBC   **School Board Liability**

Use for information outlining and limiting the Board's legal liability for negligence claims. The liability of the Board as a legal entity and of individual Board members is referenced here.

BC   **School Board Member Conduct**

Use for policies on the expectations of school Board conduct, both personal and professional. Specific details on types of conflicts of interest such as nepotism are located in BCB; a formal code of ethics is placed in BCA. This code establishes a general category; some districts will want to use the following specific codes instead.

BCA   **Board Member Code of Ethics**

BCB   **Board Member Conflict of Interest**

BD   **Organization of the School Board**

Use for statements on how the Board determines its officers, ways of conducting business, and the committee system. This code establishes a general category; some districts will want to use the following specific codes instead:

BDA   Board Organizational Meeting

Use for a policy on the meeting — held annually in most communities — at which the Board elects its officers and transacts other organizational business. Include the procedure for electing officers, but do not use for the annual meeting of the voters of the district for the purposes of electing Board members (School Board Elections/BBBG) or of adopting the annual budget (Budget Adoption Process/DBG).

BDB   Board Officers

Use for a policy describing the duties of the officers of the Board who are also Board members. Include the method of appointment.

BDC   Appointed Board Officials

Use for a policy describing the duties of the officers of the Board who are not Board members - e.g., a nonmember treasurer or secretary required by statute. Include the method of appointment. Do not use this category in place of Board Staff Assistants/BDH.

BDD   Board-Superintendent Relationship

Use for a policy that makes the nature of this relationship clear to the chief school administrator, to Board members, to staff, and to the public. Do not use for policies concerning the superintendent's job and conditions of employment; these statements belong in Section C, General School Administration.

BDE   Board Committees

Use for a policy concerning the Board's position on the use of standing and temporary committees made up of its members. Include how committees are created, assignments are made, and responsibilities are delineated. Do not use either the category on Board Committees or on Advisory Committees/BDF for policies on staff advisory committees. These policies belong in Section G, usually under Staff Involvement in Decision Making/GDB; Administrative Councils, Cabinets, and Committees/CE.

BDEA   Board Committee of the Whole

Use for a policy on the times when the Board itself functions as a committee to gather information or to listen to views.

BDF   Advisory Committees

Use for a policy on the Board's position on citizen advisory committees. Include how committees are created, assignments are made, and responsibilities are delineated.

BDG   School Attorney/Legal Services

Use for policies outlining how legal services for the district are obtained. Include information on the hiring of a school attorney or the use of a law firm or a state school boards association on a full-time or on an as needed basis. Any requirements placed on the provision of legal services to the district also are located in this category.

BDH   Board Consultants/Staff Assistants

Use for policies on the administrative and/or research support provided to the school Board on either a temporary or permanent basis. Both outside resources, such as consultants, and district staff who are assigned these responsibilities are described in this category.

BE   School Board Meetings

Use for statements on how the Board conducts its policy making responsibilities in public session. This code establishes a general category; some districts will want to use the following specific codes instead:

BEA   Regular Board Meetings

Use for all meetings that are regularly scheduled throughout the year.

BEB   Special Board Meetings

Use for Board meetings that are called by the Board for a special purpose, such as budget review, attendance area redistricting, etc. Do not place policies on Board hearings or executive sessions in this category.

BEC   Executive Sessions/Open Meetings (Also KDB)

Use for a statement covering the portions of regular or special meetings that are not open to the public or to the press. This is an area usually covered by state open meeting and sunshine laws.

BED   Meeting Procedures/Bylaws

Use for policies setting forth meeting procedures and how the Board goes about determining and changing the way the Board conducts its business (bylaws). Sections within this category follow and refer to such items as meeting notification to the public and to Board members; conditions that must be satisfied before a meeting can occur (quorum); the order of business and the contents of the agenda; how business is recorded and publicized, etc. This code establishes a general category; some districts will want to use the following specific codes instead:

BEDA   Notification of Board Meetings

BEDB   Agenda

BEDC   Quorum

BEDD   Rules of Order

BEDE   Second Language Procedures for Board Meetings

BEDF   Voting Method at Board Meetings

BEDG   Minutes of Board Meetings

BEDH   Public Participation at Board Meetings

BEDI   News Media Services at Board Meetings

BEDJ   Broadcasting/Taping of Board Meetings

BEDK   Reporting Board Meeting Business

BEE   Board Hearings/Appeal Proceedings

Use for statements on the method and procedures for granting and conducting formal hearings in general. Statements pertaining to special types of hearings might also be filed under the relevant categories such as Nondiscrimination/AC, Student Expulsion/JCE, Special Education/IHBA, Staff Concerns/Complaints/Grievances/GBK, etc.

BF   School Board Work Sessions and Retreats

Use this category for policies on meetings at which no business is

conducted — whether such meetings are held within or outside of the district. Long-range/strategic planning or Board self-evaluation are a typical meeting objective. If such sessions must be open to the public, include that information. Do not use in place of School Board Conferences, Conventions, and Workshops/BIBA or Executive Sessions/BEC.

BG   School Board Policy Process

Use for a variety of policies relating to the Board's policy development, adoption, and review process. A closely related category is Policy Implementation/CH in the C Section, General School Administration. Use the following categories to file specific policies, if desired:

BGA   Policy Development System

Use to specify the coding system adopted by the Board for school district policies as well as who Is responsible for maintaining the system. The method used to distinguish among policies, regulations, and exhibits also is relevant.

BGB   Policy Adoption

Use for a statement on Board actions necessary to make new and/or revised policies official.

BGC   Policy Revision and Review

Use for policies on the Board's periodic or continuing review and evaluation of the adequacy and effectiveness of its policies. Includes procedures defining a "policy manual accuracy check" to ensure the completeness and accuracy or all policy manuals in circulation.

BGD   Board Review of Regulations (Also CHB)

Use for a statement clarifying the Board's role in the development, approval, and review of district regulations.

BGE   Policy Communication/Feedback

Use for information on how new or revised policies are distributed to manual holders as well as on how the content of policies is communicated to interested school publics. Mechanisms for obtaining feedback — either informal or formal — are also described in this category.

BGF   Suspension/Repeal of Policy

Use for a statement on Board actions necessary to suspend or void a policy. Special Board procedures necessary for this to occur, such as a three-fifths votes, should be described in this category.

BH   School Board Communications

Use for policies on how the school Board as a Board and as members individually communicate to the various school publics, including staff and the community. All forms of communications are relevant, such as oral, written, and interpersonal. But grievances or concerns/complaints from the staff or public are not located in this category — only communications emanating from the school Board.

BHA   School District Logo and/or Motto

Use for information and exhibits on the school district's adoption of a saying, message, display, or artwork that serves to represent the school district name. How the logos and mottos are determined as well as rules for their use are described in these policies.

BHB   Use of School District/Board Member Name

Use for guidelines on when and under what circumstances the school district's and Board member's name can be used in communications or in other forms of promotion.

BHC   Board Communications with Staff

BHD   Board Communications with Public (Also GBD)

BI   School Board Member Services

Use for policies on what and under what circumstances support, financial assistance, and training services are provided to Board members. This code establishes a general category; some districts will want to use the following specific codes instead:

BIA   New Board Member Orientation/Handbook

BIB   Board Member Development Opportunities

Use for a statement on planning a program of professional education for Board members. The method to determine what activities are undertaken as well as necessary follow-up in terms of reporting back to the Board are described.

BIBA   Board Member Conferences, Conventions, and Workshops

Use for a policy that specifies state, regional, and national meetings that Board members are authorized to attend as part of an ongoing development program.

BIC   Board Facilities and Services

Use for a policy on Board office facilities and on the accepted manner in which Board members may acquire secretarial and other kinds of support in the preparation of studies, communications, and reports for them as individual Board members rather than for the Board as a whole. Obtaining computer equipment, telephone, FAX lines, etc., should be included in this category.

BID   Board Member Compensation and Expenses

Use for information on whether and how much Board members are compensated for Board service and what expenses are reimbursable. The procedures used to submit expense claims should be fully described.

BIE   Board Member Insurance/Liability

Use for a statement on insurance available to the Board member relating to claims arising from service on the Board. Legal liability issues and insurance coverage are also part of this category.

BJ   School Board Legislative Program

Use for a policy pertaining to the Board taking position on state and federal legislation affecting public education.

BJA   State Legislative Program

BJB   Federal Legislative Program

BI   School Board Memberships

Use for a policy concerning the institutional membership of the Board an/or the school district. Here, for example, is the place to record the Board's membership in the state school boards association, the Direct Affiliate Program of NSBA, school study councils, etc. File policies on participation in interdistrict coopera-

tive programs/LB, however, under appropriate categories in Section L.

BKA   **Liaison with School Boards Associations**

Use for a policy on how the Board plans to maintain liaison and communication with its state school boards association and with NSBA.

C — General School Administration

Section C contains policies on the management of the school district and its schools, including such areas as line/staff relationships, administrative organization, systemwide reforms, special programs, and policy implementation. It also is the location of personnel policies for the superintendent, senior administrators (management team), and school principals.

CA   **Administration Goals/Priority Objectives**

Use for statements on goals and objectives related specifically to administration; may include the process used to set goals and priority objectives.

CAA   **Evaluation of School Administration**

Use for policies on how the administration evaluates itself as well as on how the school Board measures its progress towards goals and accomplishments. The CA category refers to the setting and evaluating of administration goals not to individual staff accomplishments.

CB   **School Superintendent**

Locate all policies pertaining to the superintendent in the main category or use as many of the following categories as necessary. If multiple codes are selected, then use the parent descriptor, School Superintendent, for a general statement on the superintendency and its role in school district operations. This policy might emphasized some of the principles contained in the policy on Board-Superintendent Relationship/BDD.

CBA   **Qualifications of Superintendent**

Use for filing the superintendent's job description. Unlike other school job descriptions, this often involves extensive policy development by the Board.
CBB Recruitment of Superintendent

CBC   **Superintendent Powers and Responsibilities**

CBD   **Superintendent's Contract**

Use this category both for a policy statement on how the contract is developed by the Board and under what circumstances the contract can be reviewed and revised. A copy of the contract should also be included.

CBE   **Superintendent's Salary, Compensation, and Benefits**

CBF   **Superintendent's Conduct**

Use for statements setting forth expectations of conduct, both personal and professional. Conflict of interest issues should also be addressed here.

CBG   **Superintendent's Professional Development Opportunities**

Use for a policy on the process used to determine a career enhancement/professional growth plan for the superintendent.

CBH   **Superintendent's Consulting Activities**

Use for a policy outlining what types of outside activities the superintendent may engage in, and whether or under what circumstances remuneration may be accepted.

CBI   **Evaluation of Superintendent**

Use for statements on the process used to evaluate the Board's chief executive as well as for the written instruments used to record the assessments.

CBJ   **Superintendent's Termination of Employment**

Use for statements regarding the two ways a superintendent can end his or her employment with the school Board — either by resignation or by dismissal. Either address both contingencies in one policy or separate according to:

CBJA   **Dismissal of Superintendent**

CBJB   **Retirement/Resignation of Superintendent**

CC   **Administrative Organization**

Use for a general statement on the principles governing the assignment of administrative responsibilities to central offices and to building administrators. Use the following categories for exhibits conveying similar information:

CCA   **Organization Charts**

CCB   **Line and Staff Relations**

Use for statements clarifying lines of authority and chain-of-command. This category applies to administrative relationships rather than to Board-Staff Communications.

CCC   **Staffing Formulas/Ratios**

CD   **Management Team/Senior Staff**

Use for a policy expressing the team management philosophy of administration, whereby the overall administrative responsibilities are shared under the superintendent's leadership. Statements regarding individual staff should refer only to top administrators reporting directly to the superintendent. Policies on school principals, who are the management team for building administration, are located under School Building Administration/CF.

CDA   **Evaluation of Management Team**

Use for policies on how the management team staff (specified in Code CD) are evaluated in terms of goals and achievements.

CE   **Administrative Councils, Cabinets, and Committees**

Use for statements describing the function of districtwide administrative bodies, such as the superintendent's cabinet. Do not use this category in place of Advisory Committees/BDF or as a substitute for any special purpose staff committees that are better suited to Curriculum Development/IG or Textbook Selection and Adoption/IJH.

CF   **School Building Administration**

Use for a policy on the management of individual schools, in other words, how the principal exercises his or her authority. This category underscores administrative areas of school personnel and programs

rather than the maintenance of facilities and grounds/EC. This code establishes a general category; some districts will want to use the following specific codes instead:

CFA   School Principals/Building Administrators

Use for policies relating job descriptions and general statements on the responsibilities and expectations of school principals and their management staff, e.g., assistant or vice-principals. A broad range of expectations are appropriately conveyed in this category, including school climate, communications with families, etc.

CFB   Evaluation of Principals/Building Administrators

Use for statements on the process for evaluating and the instruments used to assess the performance of building administrators.

CFC   Assignment and Transfer of Building Administrators

Use for policies clarifying how the school Board assigns building administrators to schools. Districts with rotating administrators would outline that program in this section. Portions of negotiated contracts that limit school Board discretion also would be filed in CFC.

CFD   Site- or School-Based Management

Use for policies relating to any form of decentralized management plan that transfer some of the responsibilities previously assigned to central administrators to school building staff or school communities. Phased-in programs or pilot projects also are filed in this section.

CFE   School Climate

Use for policies stating the importance of establishing a school climate — an environment conductive to learning or a set of motivational expectations relevant to all students, staff, and families —appropriate to the district and to each school community.

CFF   Support Personnel for Building Administration

Use only for policies on the allocation of support personnel to school buildings. Job descriptions or other policies regarding support staff in general belong in Section G.

CFG   Elementary School Administration

Use for policies on how elementary school are administered, however that organizational plan is defined (e.g., K-6, K-8, etc.).

CFH   Secondary School Administration

Use for policies on secondary school administration, however that organizational plan is defined (e.g., 7-12, 9-12, etc.). Districts with middle school programs might separate policies according to:
CFHA   Middle School/Junior High School Administration

CFHB   High School Administration

CG   Special Programs Administration

Use as needed for a general statement on the administration of autonomous or semi-autonomous special programs, usually sanctioned by state or federal agencies. The administrative components of the special programs should be filed in this category with other provisions located under the relevant curriculum or other policy area.

CGA   Summer Programs Administration

CBB   School-Based Child Care Programs Administration

Use for before- or after-school programs and not for preschool or primary programs that have an educational rationale. Often school-based child care programs are operated jointly or in cooperation with other agencies or groups and so the inclusion of relevant cooperative agreements relating to administration is appropriate.

CGC   Adult Education/Lifelong Learning Programs

CGD   State and Federal Programs

CH   Policy Implementation

Closely related policies appear under Board Policy Development/ BGA. However regulations/procedures are defined, the manner in which Board policies are implemented or administered is included in this category. Also appropriate to this topic is the development of regulations and the administrative perspective on Board review and approval of regulations. Some districts might cross-file the same policy on Board Review of Regulations under CH/CHB and BGD. This code establishes a general category; some districts will want to use the following specific codes instead:

CHA   Development of Regulations

Use for a policy on the development of district regulations, the involvement in the process of staff and other persons affected by the regulations, and the authority of the superintendent to provide such regulations (perhaps after submitting them for Board approval).

CHB   Board Review of Regulations (Also BGD)

CHC   Regulations Communication

Use for policies stating how new or revised regulations are communicated to the appropriate parties responsible for implementation. Also relevant are ways to publicize important regulations to parents and the community at-large.

CHCA   Handbooks and Directives

Use for statements pertaining to the contents of handbooks, directives, and similar administrative documents, and the authority to issue them.

CHD   Administration in the Absence of Policy

Use for a policy that enables the superintendent to act in emergency situation for which no written policies establish guides for action.

CI   Temporary Administrative Assignments

Use for a policy authorizing the use of substitute, acting, or part-time administrators to meet emergency or unanticipated situations such as the absence of the superintendent. Use this category for the reassignment of a school administrator; use Administrative Consultants/CK, when a person from outside the organization is brought in to perform the responsibilities.

CJ   Administrative Intern Programs

Use for a policy that describes the purposes and parameters of an intern program for administrators where training is provided to persons outside of the school system who aspire to a career in school administration.

CK   Administrative Consultants

Use for policies on the use of outside sources to fill emergency or unanticipated staff situations such as a long-term illness or absence or to provide professional help or training to divisions or departments, but not to the Board itself (in this latter case, Consultants to the Board/BDH is preferred).

CL — Research/Administrative Reports

Use for a policy on the authority and responsibility of the administration to produce reports during the year (except for the annual report which is described in the next code, CM). Both required reports and requests for research analyzes should be included.

CM — School District Annual Report

Use only to describe the timetable, contents, and objectives for the district's annual report on the schools.

D — Fiscal Management

Section D contains policies on school finances and the management of funds, except for the financing of facility construction or renovation, which is covered in Section F. the sequence of these policies outline an effective process for budget development and implementation.

DA — Fiscal Management Goals/Priority Objectives

Use for statements concerning goals and priority objectives related specifically to fiscal management. Include the process used in setting goals and objectives.

DAA — Evaluation of Fiscal Management

Use for a policy outlining the methods to assess the effective-ness and efficiency of the school financial management system.

DB — Annual Budget

Use this sequence of categories (DBA through DBJ) to describe the budget-making process. The parent category, Annual budget/DB, may be used for a general statement explaining the essential purpose of the budget as an annual blueprint for action, accomplishment, and fiscal control. Codes DBA through DBJ should be used to set out the guidelines required by state law and/or local policy for developing the best possible budget for meeting school and district goals and objectives. This code establishes a general category; some districts will want to use the following specific codes instead:

DBA — Budgeting System

Specify what type of budgeting methods are sanctioned.

DBB — Fiscal Year

DBC — Budget Planning

Include statements on how staff members, citizens, and perhaps can participate in the budget process.

DBD — Determination of Budget Priorities

Use for a policy that calls for the development of priorities as a guide for budget planning.

DBE — Communication of Budget Recommendations

Include statements on the ways budget information at various stages of the budget development process are communicated to different school constituencies. Both forms of printed communications and other types of communications are relevant to this heading.

DBF — Budget Hearings and Reviews

Much of this and the next two categories are determined by the requirements of state law and local policy.

DBG — Budget Adoption Process

DBH — Budget Appeals

DBI — Budget Implementation

Use for guidelines for expending budgeted funds to meet school goals and objectives. However, do not use Budget Implementation in place of Purchasing Procedures/DJ or Budget Transfers/DBJ.

DBJ — Budget Transfers

Use for a policy stating under what conditions budgeted monies may be transferred from one fund, account, or line item to another.

DC — Taxing and Borrowing

Use for an information statement on the authority and limitations established by law. Create related categories as necessary for special policies or state requirements pertaining to the Board's authority to purchase short-term and tax anticipation notes and to the Board's responsibility to hold tax and bond elections. Related categories include Facilities Funding/FD, Bond Campaigns/FDA (for capital improvements), and Relations with Financial and Tax Authorities/KLA.

DD — Funding Proposals, Grants, and Special Projects

Use for statements on the Board's position on seeking special funding from governmental and other sources and for procedures that must be observed in making applications. Districts with substantial amounts of these funds may want to subdivide the category as follows:

DDA — Funding Sources Outside the School System

DDB — Funding Sources Within the School System/ Mini-Grants

Use for a policy on funding innovation within the school district through a mini-grants process; particularly relevant for site-/ school-based management.

DE — Revenues from Tax Sources

This code establishes a general category; some districts will want to use the following specific codes instead:

DEA — Funds from Local Tax Sources

DEB — Funds from State Tax Sources

DEC — Funds from Federal Tax Sources

DF — Revenues from Nontax Sources

Use for policies on school funds obtained from private sources, revenue-based activity, rentals, interest-bearing accounts, and royalties. This code establishes a general category; some districts will

want to use the following specific codes instead:

DFA Revenues from Investments

Use DFA for a policy on the investment of idle funds and how income from investments is used.

DFAA Use of Surplus Funds

Use a separate policy, if needed, to distinguish between surplus funds and the funds for investment.

DFB Revenues from School-Owned Real Estate

Use for a policy on the acquisition and use of funds from district-owned real estate holdings (such as school property, residences, office buildings, etc.); may include information on the management and use of such revenues. Use Rentals and Service Charges/DFC for administration of leases.

DFC Rental and Service Charges

Use for statements on the generation of income through the rental of unused school facilities on a regular basis, and on the use of such income and income from service charges; also include the administration of leases for district-owned property. But community Use of School Facilities/KF is the location for fees charged local groups for school facilities use. Any fees charged students are filed under Student Fees, Fines, and Charges/JQ.

DFD Gate Receipts and Admissions

Use for a policy describing how ticket sales for school events and activities, such as sports, are collected, deposited, and used.

DFDA Free Admissions

Use for a "free-pass" policy for selected groups of citizens, say senior citizens. But in this case, the policy should be cross referenced or placed in Relations with Senior Citizens/KJI.

DFE Royalties

Use for arrangements for royalties or payments for videotapes, learning units, computer software, or other curriculum materials developed by school staff at district expense. Although this policy or portions thereof should be included in Personnel/Section G under Professional Research and Publishing/GCS, it is important to reference the information in both places.

DFF Income from School Sales and Services

Use for a policy on the generation and use of income from school shops or other types of school-based products and services. Include marketing, pricing, payment controls, and statements on liability protection. Other policy codes may be created to cover particular services. A closely related category is Vocational-Technology Education/IHAI.

DG Banking Services

Include information on the type of banking services used by the school Board, the method of deposit, and how these financial institutions are chosen. It is also the place to name the bank selected by the school Board as the depository of funds, including student activities funds.

DGA Authorized Signatures

Use to specify the signature(s) that should appear on school Board checks and to provide for the use of facsimile signatures.

DBG Check-Writing Services

Use for information on internal or outside services to issue checks for various purposes, including payroll and petty cash. DGCLoans/Employee Credit Unions

Use for a policy on making loans to employees and the specific conditions and limits on this service. Provisions for credit unions should be outlined as necessary.

DGD Credit Cards

Use to describe under what circumstances employees are issued district credit cards and the rules governing their use. Also include policies authorizing agreements with banks to produce credit cards with the school district name/logo to be made available to the public and to serve as a revenue generator for the schools.

DBE Personal Debts of Employees

Use for policies on the garnishments of employee salaries to recover uncollected debts. The types of information given to collection agencies about the employee should be spelled out.

DH Bonded Employees and Officers

Use for a policy specifying which Board officers and staff are bonded.

DHA Contracts/Signing Authority

Use to designate which Board officers and staff are authorized to sign school district contracts or purchase orders.

DI Fiscal Accounting and Reporting

Use for policies on fiscal accounting and reporting procedures. The general category can be disregarded or used for a general statement on this topic.

DIA Accounting System

Use for statements on the authorized accounting system for school funds.

DIB Types of Funds/Revolving Funds

Use to specify the various types of monies collected or received by school officials.

DIC Financial Reports and Statements

Use for a statement on the types of reports required by state law, local governing bodies, and/or the school Board.

DID Inventories

Use for a policy on inventory accounting and reporting — not in place of a policy on Receiving and Warehousing/EDA. This code, however, may be used in place of Materials and Equipment Records and Reports/EDD.

DIE Audits/Financial Monitoring

Use for information on audits required by law and by the Board. May include procedures for selection of independent auditor as well as the school district's internal auditing procedures. continual financial monitoring and how that information is reported should also be described.

DJ   Purchasing

This code establishes a general category; some districts will want to use the following specific codes instead:

DJA   Purchasing Authority

Use for a policy that establishes authority for making purchases in the district's name. Include categories of purchases that may be made by the administration (within budget limitations) and categories of purchases requiring Board approval. Do not use Purchasing Authority in place of Purchasing Procedures.

DJB   Purchasing Procedures

Use for a policy to cover the purchase of goods and services except for food (Food Purchasing/EFA), land (Site Acquisition/ FEE), and construction services (Contracts Bidding and Awards/ FEG). Include here, or under specific codes as needed, statements on obtaining price quotations; the writing of specifications; quality control measures; preparation of vendor lists; cost control measures such as product standardization and quantity purchasing; requisitioning; purchase orders; change orders; and delivery verification.

DJC   Petty Cash

Use for a policy that authorizes and sets controls on the use of petty cash accounts in schools and offices.

DJD   Cooperative Purchasing

Use for a policy that expresses the Board's stance toward cooperative purchasing activities with other school districts an/or agencies. Related codes include Relations with Local Government Authorities/KLK, Relations with other Schools and School Districts/LB, and Shared Services.

DJE   Bidding Procedures

Use for a policy on purchases that must be put to bid; include statements on advertising for bids, bid opening, contract awarding procedures, etc. (much of which may be mandated by law). Related codes include Purchasing Procedures/DJ and Construction Contracts Bidding and Awards/FEG.

DJF   Local/Competitive Purchasing

Use for a policy that expresses the Board's stance regarding coding business with local vendors and what cost or other factors influence specific purchasing decisions.

DJG   Vendor Relations

Use for a policy on the relationship between school staff members with responsibility for purchasing and vendors of school products or services.

DJGA   Sales Calls and Demonstrations

Use for a policy that sets the ground rules for sales representatives visiting the schools or offices of staff without responsibility for purchasing decisions.

DK   Payment Procedures

This code establishes a general category; some districts will want to use the following specific codes instead:

DKA   Payroll Procedures/Schedules

Use for a statement on the process for drawing up and making payments on the payroll account. Include information on the annual schedule of paydays.

DKB   Salary Deductions

Use to specify what expenses may be directly taken out of an employee's salary and how these deductions can be changed by the employee.

DKC   Expense Authorization/Reimbursement

Use for information on the reimbursement of expenses incurred by staff and school officials in carrying out authorized school business. In some cases this will include Board member expenses, but this policy could be filed under Board Member Compensation and Expenses/BID as well. Certain types of reimbursement are better classified under Fringe Benefits/GCBD/GDBD for the appropriate category of staff — e.g., reimbursement for uniforms and tuition refunds.

DL   Management of Staff Funds

This code establishes a general category; some districts will want to use the following specific codes instead:

DLA   Employee Benefits Administration

Use for information on how the funds collected from employees or directed toward employee benefits are managed and accounted for in a responsible manner.

DLB   Tax-Sheltered Annuities

Some districts will want to spell out the conditions relating to tax-sheltered funds and the responsibilities accruing to the employee and to the school district.

DM   Cash in School Buildings

Use for a policy on the safeguarding, accounting for, and management of cash in school buildings and offices.

DN   School Properties Disposition

Use for a policy that determines the manner for selling, giving away, renting, or otherwise using for nonschool purposes of school property. Include real property, equipment, and materials. A related policy code is Closing of Schools/FEB.

E — Support Services

Section E contains policies on noninstructional services and programs, particularly those on business management such as safety, building and grounds maintenance, office services, transportation, and food services. Some areas might correspond with existing administrative departments; others (e.g., safety program and management of material resources) may be interdepartmental in nature. This section is not intended to correspond with any district's organization. Its purpose is to establish policy categories for a variety of support activities.

EA   Support Services Goals/Priority Objectives

Use for statements concerning goals and objectives specifically related to support services; may include the process for setting goals and objectives.

EAA   Evaluation of Support Services

Use for a policy on how support activities will be evaluated and held accountable.

EB   Environmental and Safety Program

Use for an umbrella policy on environmental risk management and the safety program. Areas of environmental and safety concern can be addressed separately or incorporated into an environmental risk audit process. This section will include any federal and state laws and regulations that form a part of the schools' compliance program. Closely related codes are Staff Welfare/Protection/GBG and Student Welfare/JL. OSHA requirements may be filed here with a cross reference to Staff Welfare, or vice versa. Environmental and health safety refers to conditions beyond the control of any one individual, whereas accident prevention and safety concern inspections of facilities and materials and proper training of staff, students, and the public to prevent mishaps.

EBA   Building and Grounds Inspections

Use to describe audit or other procedures adopted to identify and evaluate risks. Specific authority and responsibilities should be assigned and a monitoring system outlined.

EBAA   Reporting of Hazards/Warning Systems

Use for a chain-of-command type policy allowing — and encouraging — students and staff to report suspected hazards. Associated paperwork and how these reports are handled also should be described. Warning systems utilizing electronic or other means of identifying risks belong under this heading.

EBAB   Hazardous Materials

Use to define such materials and the different management options available in each case. Proper handling and disposal procedures as well as federal and state rules governing this area are included.

EBAC   Environmental and Safety Audits

Use for a procedures to identify and evaluate risk. Sometimes this policy will incorporate the use of citizen or staff committees to perform or report on some of the functions.

EBB   Accident Prevention and Safety Procedures

Use for policies on the prevention of student, staff, or visitor accidents. Although many of the procedures might be similar to environmental safety risk management, the focus is on individuals and what they can do to reduce the likelihood of an accident.

EBBBA   Prevention of Disease/Infection Transmission

Use for information on how to prevent the spread of infection and disease through good hygiene by students and staff as well as by an effective sanitation program implemented by support personnel and at times teachers.

EBBB   Accident Reports

Use to specify how accidents involving students, staff, or visitors are reported.

EBC   Emergencies

Use as an umbrella policy that incorporates the subject matter of the following codes relevant to the district or use the specific policy headings when detailed procedures in each case are substantially different from the others.

EBCA   Disaster Plans

EBCB   Safety Drills

Use for information on fire and other types of safety procedures that are usually practiced one or more times during the year.

EBCC   Bomb Threats

EBCD   Weather-Related Emergencies

EBCE   School Closings and Cancellations

Use for a policy assigning authority to close schools for snow days and other emergencies; include notification procedures. Employees expected to report to work on snow days should be noted in policies on time schedules and that category should be cross referenced appropriately in this policy.

EC   Buildings/Grounds/Property Management

The general code may be used to assign responsibility for the management of the district's physical plant and property. However, do not use this code in place of School Building Administration/CF, which refers to the administrative operation of schools.

ECA   Security

Use for a policy on the staff and resources available to maintain secure and safe school buildings and offices. Security procedures, electronic and other types of systems, and special staff assignments (or use of outside security services) are described.

ECAB   Access to Buildings

ECABA   Staff/Student Identification Procedures

ECAC   Vandalism

ECAD   School and Personal Property Replacement/ Restitution

This code is closely related to Staff Welfare/Protection, either one may be used and cross referenced, if desired.

ECAE   Security Services

ECB   Building and Grounds Maintenance

Use for policies on the staff and resources allocated to keeping school facilities and property in good condition. Daily responsibilities should be assigned and procedures for handling the nonroutine duties specified. Large districts might want to further refine their categories according to the following codes:

ECBA   Building Maintenance

ECBB   Grounds Maintenance

ECBC   Recreational Facility Maintenance

With trends toward cooperative programming and mixed funding strategies for recreational facilities in schools, a policy in these areas acknowledges the agreements and assigns responsibilities both financial and otherwise for their inspection and maintenance. Upkeep on community built playgrounds, for instance, would be described here.

ECC   Building and Grounds Records and Reports

ECD Custodial Services

Use for a policy only on custodial services (not maintenance or security services) relating to keeping the facilities clean and neat. In some cases, custodial staff will perform maintenance and security but that should be included in the appropriate categories as well as here.

ECE Traffic and Parking Controls

A closely related category is Student Automobile Use and Parking/JLIE. Use this code for a policy governing public and employee parking and traffic regulations both on school property and, when necessary, in nearby neighborhoods.

ECF Energy Conservation

Use for policies establishing guidelines both for building construction/renovation and for the day-to-day operation of schools in an energy efficient way. Sometimes audit procedures are included as well as incentive programs to encourage students and staff to identify new conservation methods.

ED Materials and Equipment Management

Use for a general policy that might include assignment of responsibility for the management of school-owned equipment, supplies, and materials.

EDA Materials and Equipment Receiving and Warehousing

Use to describe the system for receiving, storing, and distributing goods. However, do not use in place of either Purchasing Procedures/DJB or Inventories/DID.

EDB Maintenance and Control of Materials and Equipment

Use for statements setting forth control and maintenance systems for instructional and noninstructional materials and equipment, audiovisual equipment, computers, etc. Additional codes should be used as needed. Arrangements for loans of books and materials to home schools or nonpublic schools is included under those policy headings.

EDC Authorized Use of School-Owned Materials and Equipment

Use for statements covering such matters as the loan of projectors, computers, or tape recorders to students or staff members for home use or to community groups. As needed, add new codes for special types of equipment/materials and special users. However, do no use in place of Community Use of School Facilities/KF or Responsibilities of Employee Negotiating Organizations/HI.

EDD Materials and Equipment Records and Reports

EDE Waste Management and Recycling

Use for policies on all aspects of resource conservation/waste management/recycling programs. Selection of school and office coordinator, education and promotional efforts, collection mechanisms, cooperative agreements with other groups, etc., are included.

EE Transportation Services

Use either for a general policy on the management of all transportation services or only as a policy heading for the following specific policies:

EEA Student Transportation

Use for information on the student transportation program. This code generally should be used to establish the program's goals, responsibilities, and general parameters.

EEAA Walkers and Riders

Use to specify the distances and/or conditions determining whether a student is entitled to public transportation to and from school. Arrangements providing transportation of parochial and private school students in public transportation usually is included under Relations with Private Schools/LBC.

EEAB Special Education Student Transportation

Use for policies setting forth the type of buses, routes, and special equipment necessary to provide transportation to special education students, both from their home to school and from their home base school to other schools or center where they go for special services.

EEAC Bus Scheduling and Routing

EEAD Bus Passes

Use for a policy on the forms of identification given to students or others entitled to use the bus system.

EEAE Bus Safety Program

Use for policies describing the measures sanctioned to ensure the safety of students on the buses. Purchasing requirements, safety equipment, and emergency procedures are included in this category as well as is bus driver and student training. Relevant state and federal laws should be indicated. This code establishes a general category; some districts will want to use the following specific codes instead:

EEAEA Bus Driver Requirements, Training, and Responsibilities

EEAEB Bus Purchasing and Maintenance

EEAEC Student Conduct on Buses

Use to set expectations of student conduct on buses as well as disciplinary measures for infractions, up to and including the denial of the transportation privilege. The use of student handbooks and acknowledgement forms signed by both parents and students also is placed in this category. Include the authority of bus drivers to maintain discipline, but designate the use of student bus patrols under the next heading, Safety/Bus Patrols.

EEAD Safety/Bus Patrols

Use to authorize student or adult patrols. Include selection criteria, training requirements, responsibilities, and a demarcation of their authority vis a vis the bus driver.

EEAE Bus Emergencies

Use for guidelines on how bus drivers should handle emergency situations as well as on how district personnel should notify the proper authorities and handle media and parent inquiries. Weather-related emergencies and student or bus driver sudden illness are usually addressed as well as other vehicular accidents.

EEAF Special Use of Buses

Use for statements on the use of school buses for field trips, activity trips, etc. Statements on the use of buses by community groups may

be included, or a new code assigned to accommodate them. This category should not be used for a policy on busing to achieve racial integration. Policies on integration are filed under Equal Educational Opportunities/JB, Nondiscrimination/AC or School Attendance Areas/JC. Neither should Special Use of School Buses be used in place of Field Trips and Excursions.

EEAFA   Extracurricular Activity Buses/Field Trips-Special Events Transportation

Use when special conditions require different types of transportation for students at extracurricular events, such as the use of private carriers.

EEAG   Student Transportation in Private Vehicles

Include restrictions on the use of private vehicles, both on a planned or on a casual basis. A related code is Use of Private Vehicles on School Business/EEBB

EEAH   Student Transportation Insurance

EEAI   Student Transportation Records and Reports

EEB   Business and Personnel Transportation Services

Use for one or more policies on the school district's fleet of vehicles other than busrs. The general category may be used for a statement on the purpose and management of such services with the following codes applicable to specific concerns:

EEBA   School-Owned Vehicles

Use for, among other purposes, guidelines as to which staff members are provided with school-owned automobiles or other vehicles on a regular or occasional basis and the permitted use of such vehicles.

EEBB   Use of Private Vehicles on School Business

Use for a policy concerning the condition of such use by staff members. However, do not use in place of Expense Reimbursements/DKC.

EEBC   Business and Personnel Transportation Insurance

EEBD   Business Tramsportation Records and Reports

EF   Food Services

Use this general category for a set of policies on the school food program. This code may be used to set forth program goals, purposes, management plan, etc. May include: types of food programs provided; general nutritional requirements; statements pertaining to sale of "junk" food, and "competetive" food sales. Extensive policies on the last two topics may be accommodated under the more specific codes listed below:

EFA   Food Purchasing/Selection

Use for guidelines on how the food items or ingredients are selected and purchased including the surplus commodities offered through federal programs (if the specific policy that is not used).

EFAB   Use of Surplus Commodities

EFB   Menu Development/Options

Use to describe the choices available to meal planners in their choices of meals and weekly/monthly nutritional or promotional themes.

EFC   Free and Reduced Price Food Services

Summarize the required policy for participation in national school lunch and other funded food programs. A policy on food services for the elderly may be accommodated under a specific policy or this one and cross referenced in Relations with Senior Citizens/KJI.

EFD   Pricing of and Payment for Food Services

Describe how the price of individual meals for students and staff is determined as well as how those payments are made, e.g, meal tickets, cash, or coupons.

EFDA   Collection of Money/Food Tickets

Use for information on how tickets are issued and redeemed as well as on the procedures to account for monies collected for individual meals or for tickets.

EFE   Competitive Food Sales/Vending Machines

Use for statements that allow, limit, or prohibit vending machine installation or competitive food sales. If such services are allowed, designate how the money will be controlled and allocated.

EFF   Adult Food Services

EFG   Catering and Food Services at School Activities/ Events

Specify any applicable restrictions on food and beverages, such as alcoholic drinks, at adult functions.

EFH   Food Service Sanitation Program

EFI   Food Services Records and Reports

EG   Office Services

Use for guidelines on the provision of general office services both to central administration and to school buildings. Note that the allocation of clerical/support staff to school buildings is filed under Support Personnel for Building Administration/CFF.

EGA   Communication Services

Use for a policy on "word and data processing" rather than in place of such codes as Board-Staff Communications/BHC, Administrative Reports/CL, and School-Sponsored Information Media/KDC. This code establishes a general category; some districts will want to use the following specific codes instead:

EGAA   Data Processing

EGAB   Photocopying Services

EGAC   Printing, Production, and Graphic Arts Services

EGAD   Copyright Compliance

Use for issuing strong language about and for monitoring of the responsibilities to obey the copyright laws on all types of materials — publications, films, tapes, computer software, etc.

EGAE   Mail and Delivery Services

EGAEA   Electronic Mail

EGAEB   FAX Service

EGAF   Telephone Service

EGB   **Clerical Services**

Use for a policy on services supplied to teachers, among others, but do not use it as a substitute for Teacher Aides/IJMA

EGC   **Notary Public**

EGD   **Use of Technology in Office Services**

Use for statements on the district's goals to utilize technology as much as possible in office services. May include listing of specific technology resources and ways they promote efficiency.

EGE   **Office Services Records and Reports**

EH   **Data Management**

Use for a policy on computerized data systems and records management. Include the goals for developing a centralized system for collecting, processing, and analyzing data.

EHA   **Computerized Data Systems**

EHAA   **Computer Security**

Use for information on how the confidentiality of school information and records is protected as well as on how accidental erasures or other mishaps are guarded against in the case of disasters or other unforeseen emergencies.

EHB   **Data/Records Retention**

Use for a general policy to state requirements for records compilation and retention. May include special techniques for storing records, procedures required prior to records disposal, etc.

EI   **Insurance Program/Risk Management**

Use for policies outlining the district's program for insurance/liability coverage and risk management. However, insurance benefits for staff are filed under Fringe Benefits/GCBD/GDBD. A special category for Board Member Insurance/BIE is available. Districts using a variety of methods, such as insurance pools and traditional insurance policies, will want to specify separate policies in the following areas:

EIA   **Property Insurance**

EIB   **Liability Insurance**

EIC   **Self-Insurance/Insurance Pools**

F — Facilities Planning and Development

Section F contains policies on new construction as well as on related activities such as long-range planning; remodeling and modernizing facilities; leasing, and renting, and closing buildings to meet the needs of growth and change.

FA   **Facilities Development Goals/Priority Objectives**

Use for statements concerning goals and objectives specifically related to expansion and/or improvement of facilities; may include the process for determining goals and priorities.

FAA   **Evaluation of Facilities Planning and Development**

FB   **Facilities Planning**

Use for a policy on long-range planning for school sites, facilities, and improvement. File policies pertaining to the planning of specific projects under Facilities Construction/FE. If environmental impact statements are required, include this information but also cross reference the material in Relations with Environmental Protection Agencies/KLI.

FBA   **Planning Advisers**

Use for a policy on the role of specialists and advisory groups in developing long-range plans and/or planning projects. More specific codes may be used for special types of advisers and school building committees.

FBB   **Enrollment Projections**

Use for a policy outlining the process to project next year and multiyear enrollments, both districtwide and according to school building.

FC   **Building Accommodations**

Use for a description of the facility options available in response to increasing or decreasing enrollments. Closing rooms, wings of buildings, and entire schools constitute one end of the spectrum; adding trailers and modular additions to buildings, using noninstructional space in schools, and renting outside facilities are some of the choices on the other end. Also use for a policy on emergency school housing. One or more of the following codes should be used as applicable to school district conditions:

FCA   **Combining Schools**

FCB   **Closing Schools**

Use for a policy on closing facilities due to obsolescence or decreased enrollment. Include criteria for determining whether a building should be closed, the procedures used to make such a determination, and the process of actually closing a school (notification of parents, staff, etc.) Use School Properties Disposition/DN for policies on the sale/other disposal of unused real property; use Rental and Service Charges/DFC for leasing/renting arrangements. Other policy areas relating in part to school closings are: Professional Staff Assignments and Transfers/GCK; Reduction in Professional Staff Work Force/GCQA; Support Staff Assignments and Transfers/GDJ; Reduction in Support Staff Work Force/GDQA; and School Attendance Areas/JC.

FCC   **Temporary School Facilities**

FD   **Facilities Funding**

Use for a policy that describes the Board's preferred or required approach to funding facilities improvements.

FDA   **Bond Campaigns**

Use for a policy on the Board's attitude regarding the school system's official involvement in information campaigns or promoting a "yes" vote on bond issues. Include the district organization used to support a bond campaign as well as the use of citizens' committees or a bond chairperson. The diverting of public funds to campaign expenses often is regulated by state law and court decisions.

FE   **Facilities Construction**

Use either for a general policy concerning the planning and administration of construction projects or as a general heading to organize one or more of the following policies:

FEA   Educational Specifications for Construction

Use for a policy on the preparation of "ed-specs" as a prerequisite to any school construction project. "Ed-specs" concern the areas of construction that are affected by instructional or student needs, such as having an early childhood wing, the multipurpose use of a cafeteria, or having the secretary's office near the school's front door.

FEB   Architect/Engineer/Construction Manager

Use for guidelines for the selection of architects for construction projects and for specifying their project responsibilities.

FEC   Use of Consultants in Facilities Construction

FED   Construction Plans and Specifications

Use to file building construction plans that are adopted after consideration of the educational specifications. Include policies on energy-saving construction and buildings designed to accommodate the handicapped/disabled either here or under construction Plans/FEDB.

FEDA   Site Plans

FEDB   Construction Plans

FEDC   Construction Equipment and Materials

FEE   Site Acquisition

Use for a policy describing the Board's approach to identifying sites for school purpose and its method for acquiring land.

FEF   Construction Cost Estimates

Use for a policy on how and by whom preliminary and final cost estimates for construction projects are obtained.

FEG   Construction Contracts Bidding and Awards

Use for a policy that clarifies responsibilities for and the processes by which construction contracts are awarded.

FEGA   Contractor's Fair Employment Clause

Use for an information statement or policy concerning any fair employment or affirmative action requirements imposed on the contractor.

FEGB   Contractor's Affidavits and Guarantees

Use to specify affidavits and/or guarantees that the contractor must provide.

FEH   Supervision of Construction

Use for a policy to clarify the responsibilities of the architect, clerk of works, school administrators, and/or others for overseeing construction projects.

FEI   Construction of Recreational Facilities

Use in situations when the construction of recreational facilities requires collaboration or joint planning with other governmental bodies or local agencies. Include facilities such as planetariums or pools that call for specialized design and construction.

FEJ   Construction Records and Reports

FF   Naming Facilities

Use for a policy on the naming of school facilities.

FFA   Memorials

Use to establish the Board's position on designating any facility (e.g., swimming pool; athletic field, a school) as memorials.

FFB   Names on Plaques

Use to handle problems associated with deciding what categories of names or types of descriptions are engraved on building plaques.

FG   Board Inspection and Acceptance of New Facilities

FH   Staff Orientation to New Facilities

Use for a policy on the special inservice training provided staff on the use and care of new facilities.

FJ   Facilities Renovations/Improvements

Use for a policy dealing with the modernization/improvement program as well as with the process to determine renovation priorities. However, do not use in place of Buildings and Grounds Maintenance/EC.

G — Personnel

Section G contains school Board personnel policies. It has two major sections: Professional staff and classified/support staff — all school employees except for the superintendent/CB, whose policies are located under General School Administration. In most cases the category of professional is divided into instructional staff and administrators because of their different responsibilities, working year, salary schedule, etc.

Professional Staff/GC: This set of policy categories applies to all employees, including administrators, who must in most cases have certification from state authorities to hold their positions. Instructional staff usually are teachers but the category also includes other school-based personnel, such as guidance counselors, resource specialists, and nurses, whose responsibilities directly relate to students.

Support/Classified Staff/GD: This set of policies applies to all employees who provide administrative, technical, and logistical support to a school or educational program. These employees do not need certification from state education authorities to hold their positions.

All policies that relate to the process of formal negotiations — that is, the conditions established through collective bargaining — are properly referred to under appropriate descriptors in the Personnel Section/G.

Conditions established by negotiated agreements are too important to ignore in the personnel section of a policy manual. Additionally, other personnel policies and regulations often must be read and interpreted in the light of conditions established in the agreements. For a way to coordinate the contents of negotiated agreements with the contents of policy manuals, see the section, "How will you treat agreements negotiated with staff?" under the heading of "Basic Decisions about Content" in Section 7 of this Guide.

GA   **Personnel Goals/Priority Objectives**

Use for statements on goals and objectives specifically related to personnel policies; include process for determining goals and priority objectives.

GAA   **Evaluation of Personnel System**

GB   **General Personnel Policies**

Use for policies that affect most if not all employees. New in this edition of the Reference Manual are categories for policies on Drug-Free Workplace and Tobacco-Free Schools.

GBA   **Open Hiring/Equal Employment Opportunity and Affirmative Action**

Use for a statement on nondiscrimination in employment, but not for specific policies on recruiting, hiring, and promotion which are better filed under the codes referencing either support, administrative, or instructional staff.

GBAA   **Sexual Discrimination and Harassment**

GBAB   **Pay Equity**

Use for information on the process to evaluate a district's compensation strategy in regards to overall fairness to certain groups of employees, often based on gender. Also include a statement on the school Board's commitment to the principle of pay equity.

GBB   **Staff Involvement in Decision Making**

Use for a general policy summarizing ways staff members are involved in the district's decision-making process. Do not use for policies on staff involvement in particular areas such as school-based management or curriculum development. These are better filed under General School Administration/Section C and Instruction/Section I, respectively. Staff involvement in decisions through collective bargaining is accommodated in Section H/Negotiations.

GBC   **Staff Compensation**

Use for a policy on general goals guiding policy development on this topic. The process used to evaluate compensation policy is located here, but specific schedules and plans are filed under the appropriate staff category.

GBCA   **Merit/Performance Pay Programs**

Use for a general policy adopting or supporting the principle of performance pay or merit reviews. In most school districts the implementation of such programs requires a high level of commitment, and so is appropriately expressed under general personnel policy.

GBD   **Communications with Staff**

The policy filed in Section B/School Board Governance and Operations under Board Communications with Staff can be located here as well or another policy can be developed with more specific forms or avenues of communication detailed.

GBE   **Staff Rights and Responsibilities**

Use for a general statement of goals and expectations on behalf of the school Board as an employer and of school staff as the deliverers of service to students and to the public. Policies relating to specific areas of conduct that apply to all employees are filed under one or more of the following categories:

GBEA   **Staff Ethics/Conflict of Interest**

GBEB   **Staff Conduct**

GBEBA   **Staff Dress Code**

GBEBB   **Staff Conduct with Students**

GBEBC   **Gifts to and Solicitations by Staff**

Include guidelines for the types of presents or other forms of appreciation that staff are allowed to accept from students, families, or members of the community. Also specify which — if any — forms of appeals or solicitations to students or families may be initiated or sponsored by staff members.

GBEC   **Drug-Free Workplace** (Also ADB)

GBED   **Tobacco-Free Schools/Staff No Smoking/Smoking** (Also ADC)

Use for policies restricting or prohibiting smoking or tobacco use by staff. Include surveys or other policy development techniques employed to build consensus for such an initiative. Phased in programs and penalties for violations are described. Staff conduct policies might be revised to reflect the new standards.

GBF   **Staff Working on Federal/State Grants**

Use to describe special administrative/reporting requirements or other restrictions that apply to employees whose position in part or in full is funded by state or federal grant monies.

GBG   **Staff Welfare/Protection**

Use for a policy that deals generally with the maintenance of good health and safe working conditions among school staff. Include specific requirements, examinations, and observance of safe practices. Use cross references to policies filed under Environmental and Safety Program/EB and its subcategories as needed. Also use cross references to health insurance coverage for staff, which is properly filed under Fringe Benefits/GCBD/GDBD.

GBGA   **Staff Health**

Use for information on health requirements and the types of illness that trigger an evaluation by district personnel (or a team). Employees have legal protection in some types of long-term illnesses or diseases such as HIV/AIDS so these policies should be developed with the assistance counsel.

GBGB   **Staff Personal Security and Safety**

Use for statements on the protection of staff members from physical and/or psychological abuse, on liability protection, and such required types of protection as workers' compensation coverage. Also include measures to protect the person and property of staff while on school property. This category is similar to provisions of School and Personal Property Replacement/Restitution.

GBGC   **Employee Assistance/Wellness Programs**

Use for policies on two types of programs: employee assistance initiatives offer employees confidential help for emotional, personal, and chemical dependency problems; wellness programs promote physical fitness, disease prevention, and early detection of health problems. Types of programs vary widely, and collaboration with local agencies is common. Districts with both programs might want to separate the code into the categories GBGC and GBGCA.

GBGD Workers' Compensation

Use for information on the insurance program for work-related accidents. Include the reporting of accidents and filing of claims.

GBH Staff Participation in Community Activities

Use for a "town/gown" policy as it applies to involvement of staff members in community affairs. Policy can encourage staff participation in community organizations and civic life.

GBI Staff Participation in Political Activities

Use for a statement on the Board's position on the use of school time and facilities for electioneering purposes, leaves for running for, and holding public office. (If policies on leaves for political purposes are filed with other leave policies, cross references are needed.)

GBJ Personnel Records and Files

Use to differentiate among different types of employee files and the extent of employee and public access to each. Clarify the purpose for which information is acquired about staff members and establish procedures for the collection, verification, use, dissemination, and ultimate disposition of such information. A policy on staff directories, and release of information from the same, also may be included under this code or may be treated under one of the following policies. This policy will reflect relevant state law and court decisions.

GBJA Confidential Information and Disclosure of Information

GBJB Access to Personnel Files

GBK Staff Concerns/Complaints/Grievances

Use for statements concerning the method for encouraging communication of concerns and the informal resolution of the same in order to promote constructive dialogue and prevent divisive grievances, disciplinary actions, and other misunderstandings. Use this code to outline the procedures to satisfy both informal complaints and formal grievances.

GBL Staff Awards and Recognition

Use to encourage staff competition for district, regional, state, or national awards. Recognition ceremonies and forms of tribute can be described. Also include a process for staff reporting of professional awards or achievements. District publications or newsletters where this information is printed should be noted.

GC Professional Staff

This code establishes a general category relating to instructional and administrative staff, except for the superintendent (see the introductory material in Section G). In most cases, administrators and instructional staff are handled separately in parallel policies. Use this general code to define the relevant terms and set goals for policies in this area.

GCA Professional Staff Positions

Use for a policy concerning the establishment of professional staff positions (i.e., job titles) and the general requirement that all positions be covered by written job descriptions. Include statements on job evaluation and the updating of job descriptions. Some districts will include actual job descriptions in the policy manual; other will located them in a separate personnel manual.

GCAA Instructional Staff Positions

GCAAA Teacher Positions

GCAAB Guidance and Health Positions

GCAAC Resource Staff Positions

GCAB Administrative Staff Positions

GCB Professional Staff Contracts and Compensation

Use for general statements that will not change as actual salary figures changes. Such a policy might express contractual relationships with employees as individuals and with employee groups. It might express the Board's management goals or aims that it hopes to achieve through its salary policy. It might incorporate pertinent information from state law concerning Board-teacher contracts. However, do no use contract-related information that belongs under Professional Staff Probation, Tenure, and Seniority/GCJ. Because master contracts have the effect of policy, agreements with specific groups might be recognized here with an indication as to which categories of employees are covered by which agreements. For information purposes, it also might be useful to file a copy of the standard teacher contract as an exhibit. Policies can be classified according to the following areas:

GCBA Instructional Staff Contracts/Compensation/Salary Schedules

As desired, use to file the basic min/max salary schedules currently in force. Also use for adult education, summer school, and other similar schedules. However, the category is more useful for filing statements pertaining to original placement, annual increments, and lateral movements on salary schedules.

GCBAA Merit/Performance Pay for Instructional Staff

Use to describe all types of merit pay reward incentives, ranging from one-time bonuses for outstanding achievement to a compensation play reflecting performance reviews. Include phase-in programs and methods for soliciting staff views and support for such an initiative. Indicate the evaluation components of this program and cross reference the details to Evaluation of Professional Staff/GCO.

GCBB Administrative Staff Contracts and Compensation/Salary Schedules

See comments under GCBA.

GCBBA Merit/Performance Pay for Administrative Staff

See comments under GCBAA.

GCBC Professional Staff Supplementary Pay Plans/Overtime

Use for statements on supplementary pay such as extra compensation for coaching sports, directing plays, summer curriculum work, or differential pay because of unusual hours, unique assignments, priority location, etc. Some plans may involve several elements, including some related to competence and merit. Also use this category for overtime pay — include compensatory time when offered as an alternative. A related code is Professional Staff Extra Duty/GCMD/GCME.

GCBD Professional Staff Fringe Benefits

Use for policies on staff insurance plans to which the school system contributes, tuition refunds, and other fringe benefits.

State-required protection plans — like Workers' Compensation — are better filed under Staff Welfare/Protection/GBG. Use policies on leaves and absences for vacation-related benefits. Retirement of Staff Members/GCQE/GDQC is the proper place for information on retirement plans and benefits. Some or all of these codes can be cross referenced from a policy on fringe benefits.

GCC   Professional Staff Leaves and Absences

This code establishes a general category for one or more of the following specific policies on reasons justifying an employee's absence from work. Use the general policy to state the Board's commitment to regular attendance and the importance of this goal to the instructional program. Describe how leaves and absences policy is monitored at the school, administrative, and Board levels. Include measures to improve staff attendance and methods to report employee absences. Because of their different working years, teachers and administrators often have varying leave policies and the Board will want to separate the personnel categories. If this is not the case, the identical codes can be combined as professional staff leaves and absences in each area.

GCCA   Instructional Staff Leaves and Absences

GCCAA   Instructional Staff Sick Leave

GCCAB   Instructional Staff Personal/Emergency/Legal/ Religious Leave

GCCAC· Instructional Staff Maternity/Paternity/Parental Leave

GCCAD   Instructional Staff Military Leave

GCCAE   Instructional Staff Conferences/Training/ Workshops

GCCAF   Instructional Staff Sabbaticals

GCCB   Administrative Staff Leaves and Absences

GCCBA   Administrative Staff Sick Leave

GCCBB   Administrative Staff Personal/Emergency/Legal/ Religious Leave

GCCBC   Administrative Staff Maternity/Paternity/Parental Leave

GCCBD   Administrative Staff Military Leave

GCCBD   Administrative Staff Conferences/Training/ Workshops

GCCBE   Administrative Staff Sabbaticals

GCD   Professional Staff Vacations and Holidays

Use for a policy that deals with paid vacations and holidays as a personnel benefit. Don not use this code in place of Professional Staff Schedules and Calendars/GCL, School Year/IC, or School Calendar/ICA — or vice versa.

GCDA   Instructional Staff Vacations and Holidays

GCDB   Administrative Staff Vacations and Holidays

GCE   Professional Staff Recruiting

Use for information on how the district identifies and searches for qualified staff both from within and outside of district ranks. All forms of recruitment methods from print ads and college fairs to internal postings should be described.

GCEA   Recruiting of Instructional Staff

GCEB   Recruiting of Administrative Staff

GCEC   Posting and Advertising of Professional Staff Vacancies

GCF   Professional Staff Hiring

Use for information on how candidates, once recruited, are evaluated and hired. State requirements and review procedures as well as giving a clear picture of the search and selection process — a continuing one in some districts. This code establishes a general category; some districts will want to use one or more of the following· specific codes instead:

GCFA   Hiring of Instructional Staff

GCFB   Hiring of Administrative Staff

GCFC   Professional Staff Certification and Credential Requirements

Use to specify what certificates must be on hand before an applicant must be hired. Also note the requirements for recertification if they apply.

GCFD   Shortage of Professional Staff

Note the methods used to accurately predict staffing needs on an annual or a multiyear basis. Also describe how the district responds to situations where qualified staff can not be found in sufficient numbers and what measures are taken to correct the situation.

GCG   Part-Time and Substitute Professional Staff Employment

Use to describe the philosophy on part-time and substitute staff as well as the qualifications for different categories of substitute employees. Training, evaluation, and payment for substitute staff should be outlined. Teacher responsibilities to have material prepared for the class the substitute will teach is one example of a policy provision. Responsibilities of substitute personnel are relevant. Use one or more of the following specific codes:

GCGA   Qualifications of Substitute Staff

This varies considerably from district to district, state to state.

GCGB   Arrangements for Substitute Staff

Use to highlight the responsibilities of professional staff to prepare advance lesson plans and make these available to the substitutes.

GCGC   Job Sharing in Professional Staff Positions

Use to outline a program where two or more persons are hired for one position, and they divide up the responsibilities according to mutual agreement.

GCH   Professional Staff Orientation and Training

Use to describe the district's role in preparing newly hired teachers for their responsibilities. Do not use in place of Professional staff development which refers to a staff member's continuing professional growth, part of which it is in the district's (and often the state's interest

to promote). Refer to materials prepared by the district that contribute to a teacher's orientation and training as well as any feedback or evaluation of the effectiveness of the endeavor.

GCHA   Mentor Teachers

Use to describe the assignment of a veteran, superior teacher to a new teacher or to one with noted deficiencies in teaching content or style. Relate how mentors are identified, trained, and evaluated as well as any extra compensation or planning time they receive as benefits.

GCHB   Mentor Administrators

GCI   Professional Staff Development

Use for statements on the Board's plan for professional development of its administrators and teachers. Levels of professional development can be specified, ranging from district inservice programs and professional workshops and conferences to continuing education. Guidelines should clarify the approval process for crediting this activity and whether and under what circumstances these programs are considered as justified leaves of absences. Appropriate cross references to policies on sabbatical leaves, tuition refunds, and other related topics are suggested. One of more of the following codes can be used.

GCIA   Philosophy of Staff Development

GCIB   Inservice Requirements for Instructional Staff

GCIC   Inservice Requirements for Administrative Staff

GCID   Professional Staff Training, Workshops and Conferences

GCIE   Professional Staff Probation, Tenure, and Seniority

GCIE   Professional Staff Continuing Education

Use for a statement on the worth of staff members committing themselves to a program of continuing education in their field of professional responsibility. Board support for qualifying courses and activities is expressed here along with any financial or other incentives that accompany this support.

GCJ   Professional Staff Probation, Tenure, and Seniority

Use for a policy or information that identifies the terms of probationary employment and the conditions by which tenure (or continuing contract) status is obtained and the staff member begins to accumulate seniority rights. Do not use in place of Discipline, Suspension, and Dismissal of Professional Staff Members/GCQF.

GCJA   Instructional Staff Seniority

GCJB   Administrative Staff Seniority

GCK   Professional Staff Assignments and Transfers

Use for statements on principles and methods for staff assignments and transfers. May include assignments within schools and departments, to schools and departments, and those involving changes in job classification. The content of this category will approach and perhaps overlap with that under other codes in the Personnel Section — for example, Equal Employment Opportunity, Professional Staff Hiring, Professional Staff Promotions, Reduction in Professional Staff Work Force. Policies on principal and teacher rotation should be included here. Assignments to extra-pay and other special positions are relevant.

GCKA   Instructional Staff Assignments and Transfers

GCKB   Administrative Staff Assignments and Transfers

GCL   Professional Staff Schedules and Calendars

Use for a policy expressing the Board's position on the length of the basic work day for professional staff members. Include duty-free lunch periods; also may include length of working year for various categories of staff. Although preparation periods may be covered here, they are more frequently treated under Professional Staff work Load/GCM. Other related topics are compensatory time and tardiness, although these should also be noted under Professional Staff Supplementary Pay Plans/GCBC and Professional Staff Leaves and Absences/GCC, respectively. Do not use in Place of School Day/ID, which refers to the hours when schools are in session for instructional purposes.

GCLA   Length of Instructional Staff Work Day

GCLB   Length of Administrative Staff Work Day

GCLC   Length of Instructional Staff School Year

GCLD   Length of Administrative Staff School Year

GCM   Professional Staff Work Load

Include statements on the amount of the professional day should be allocated to specified activities as well as to the types of extra duties a staff member might have to assume. Refer to the goal of equalizing work loads and methods through which this is accomplished.

GCMA   Professional Staff Planning Time

GCMB   Professional Staff Office Hours

Describe requirements in this regard, how staff must publicize the hours, and flexibility in setting the office hours.

GCMC   Parent Conferences, Staff Meetings, and School Meetings

This category should emphasize the staff person's responsibilities to parents or to the public during these meeting times. Do not confuse with Parent Conferences/KAC, a closely related category but one emphasizing parental rights and expectations. A policy on staff meetings should require the attendance of all individuals.

GCMD   Instructional Staff Extra Duty

GCME   Administrative Staff Extra Duty

GCN   Supervision of Professional Staff

Use for a policy that provides for supervision of professional personnel and clearly locates this responsibility. Supervisory methods may be included. Although supervision involves disciplinary action at times, most policies on staff discipline are filed under Discipline, Suspension, and Dismissal/GCQF of Professional Staff Members because the content usually leads into that topic.

GCNA   Supervision of Instructional Staff

GCNB   Supervision of Administrative Staff

GCO   Evaluation of Professional Staff

Use for a statement on the importance of and the Board's

commitment to an effective evaluation system. Describe the process and goals relating to improved instruction. Incorporate or reference relevant sections of the negotiated agreement. Accountability measures should be noted either in the general policy or in a more specific one.

GCOA   **Evaluation of Instructional Staff**

GCOB   **Accountability of Instructional Staff**

GCOC   **Evaluation of Administrative Staff**

GCOD   **Accountability of Administrative Staff**

GCP   **Professional Staff Promotions and Reclassifications**

Use for information on the Board's approach to promoting staff to higher levels of responsibility and compensation. A procedure to reclassify existing jobs as duties change also is a staple of some policies.

GCPA   **Promotion and Reclassification of Instructional Staff**

GCPB   **Promotion and Reclassification of Administrative Staff**

GCQ   **Professional Staff Termination of Employment**

Refer to the alternate ways a staff member can end his or her employment in the district. Declining enrollments usually prompt detailed reduction in force policies, which should reflect the negotiated contract, if appropriate.

GCQA   **Instructional Staff Reduction in Force**

GCQB   **Administrative Staff Reduction in Force**

GCQC   **Resignation of Instructional Staff**

Advance written notice, the type of which depends on the position of the individual, is required in many school jobs. Specify under what circumstances an employee can resign in the face of pending disciplinary action by the school Board.

GCQD   **Resignation of Administrative Staff**

GCQE   **Retirement of Professional Staff**

GCQF   **Discipline, Suspension, and Dismissal of Professional Staff**

Use for a policy or information statement clarifying reasons employees may be disciplined, suspended or dismissed. A continuum of disciplinary measures can be described along with the district's commitment to communicating and working with the employee to identify the source of the problem and to find solutions. Set forth the procedures for suspension/dismissal and appeal. A staff discipline policy may be included here or treated separately, sometimes as an exhibit. Related codes include Staff Conduct/GBEB; Staff Concerns/Complaints/Grievances/GBK; Professional Staff Probation, Tenure, and Seniority/GCJ; Evaluation of Professional Staff/GCO; and Supervision of Professional Staff/GCN. Cross references may be needed.

GCR   **Nonschool Employment of Professional Staff**

Use for a policy that expresses the Board's position on outside employment by professional employees. One or more of the following codes may be used as needed.

GCRA   **Nonschool Employment of Instructional Staff**

GCRB   **Nonschool Employment of Administrative Staff**

GCRC   **Staff Consulting Activities**

GCRD   **Tutoring for Pay**

GCS   **Professional Research and Publishing**

Use for guidelines on the type of professional writing and research that staff are permitted or encouraged to do on their own or on district time. Approvals, clearances, proprietary rights to materials (print, nonprint, computer programs and software, devices, equipment) should be described as well as noting the policy on paying royalties on commercially marketable products.

GCT   **Exchange Teaching**

Use for a policy that authorizes and sets guidelines for implementing an exchange teaching program, foreign, domestic, or both. Staff leave for teaching in other countries, school districts, or institutions that does not involve teacher exchange may be included with leave policies.

GCU   **Professional Staff Membership in Professional and Union Organizations**

Use for a policy concerning memberships for professional staff that the Board will encourage and/or support. However, do not use in place of School Board Memberships or Staff Negotiating Organizations. In some areas of the country, union organizations do not negotiate contracts with the district but serve as interest groups.

GCV   **Professional Staff Facilities**

Use to describe the lounges, eating areas, recreational facilities, or other resources limited to staff use.

GD   **Support/Classified Staff**

This category establishes a general code apply to all noncertified staff whose services support the instructional program. See the introductory material in the Personnel Section for details. In most cases the codes parallel those for professional staff, and the same explanations apply and will not be duplicated here. See the corresponding code in the above categories.

GDA   **Support Staff Positions**

GDAA   **Fiscal Management and Office Positions**

GDAB   **Building and Grounds Management Positions**

GDAC   **Transportation and Food Management Positions**

GDB   **Support Staff Contracts and Compensation**

GDBA   **Support Staff Salary Schedules**

GDBB   **Merit/Performance Pay for Support Staff**

GDBC   **Support Staff Supplementary Pay/Overtime**

GDBD   **Support Staff Fringe Benefits**

Include uniforms and other equipment and resources provided to employees free of charge because they are considered essential to job performance.

GDC	Support Staff Leaves and Absences
GDCA	Support Staff Sick Leave
GDCB	Support Staff Personal/Emergency/Legal/Religious Leave
GDCC	Support Staff Maternity/Paternity/Parental Leave
GDCD	Support Staff Military Leave
GDCE	Support Staff Conferences/Training/Workshops
GDD	Support Staff Vacations and Holidays
GDE	Support Staff Recruiting
GDEA	Posting and Advertising of Support Staff Vacancies
GDF	Support Staff Hiring
GDFA	Support Staff Qualifications and Requirements
GDFB	Support Staff Selection Process
GDFC	Shortage of Support Staff
GDG	Part-Time and Substitute Support Staff Employment
GDGA	Qualifications of Support Staff Substitutes
GDGB	Arrangements for Support Staff Substitutes
GDGC	Job-Sharing in Support Staff Positions
GDH	Support Staff Orientation and Training
GDI	Support Staff Probation, Tenure, and Seniority
GDJ	Support Staff Assignments and Transfers
GDK	Support Staff Schedules and Calendars
GDKA	Length of Support Staff Work Day
GDKB	Length of Support Staff School Year
GDL	Support Staff Work Load
GDLA	Support Staff Extra Duty
GDLB	Support Staff Meetings
GDM	Support Staff Philosoppy of Career Development

Use for a comparable policy to Professional Staff Development. The terminology of career development is considered more appropriate to the needs of support personnel.

GDMA	Philosophy of Career Development
GDMB	Support Staff Training, Conferences, and Workshops
GDMC	Support Staff Inservice Requirements
GDMD	Support Staff Continuing Education
GDN	Supervision of Support Staff
GDO	Evaluation of Support Staff
GDOA	Accountability of Support Staff

GDP	Support Staff Promotions and Reclassifications
GDQ	Support Staff Termination of Employment
GDQ	Support Staff Reduction in Force
GDQB	Resignation of Support Staff
GDQC	Retirement of Support Staff
GDQD	Discipline, Suspension, and Dismissal of Support Staff
GDR	Nonschool Employment by Support Staff
GDS	Support Staff Membership in Professional/Union Organizations
GDT	Support Staff Facilities

H — Negotiations

Section H contains policies relating to the process of negotiating with staff units recognized by the school Board. Suggestions and comments made in preceding portions of this Guide are relevant here. Refer to "Basic Decisions about Content," "How Will You Treat Related Items from Agreements Negotiated with Staff?," and the general comments under Section G/Personnel.

HA   Negotiations Goals/priority Objectives

Use for goals and objectives specifically related to the purposes of the negotiating processes.

HAA   Evaluation of Negotiations

Use to describe the methods for determining the effectiveness and efficiency of the Board's negotiating process.

HB   Negotiations Legal Status

Use for an information statement to indicate whether or not bilateral bargaining is carried on under the constraints of law. Don't use in place of School Board Negotiating Powers, Duties, and Rights.

HC   Scope of Negotiations

Use for a statement that defines the matters regarded by the Board or by law as negotiable and nonnegotiable.

HD   Negotiation Style, Methods, and Procedures

Use for a statement that describes all elements of the process of negotiating, as they occur throughout the year. Styles formally or informally adopted by the Board — such as win/win negotiating — also are located here.

HE   School Board Negotiating Rights and Responsibilities

HF   School Board Negotiating Agents

Use for a policy that identifies and describes the responsibilities of the agent or agents who represent the Board at the bargaining table. If the superintendent is the primary negotiator, use the next code.

HG   Superintendent's Role in Negotiations

Use to clarify the superintendent's status in negotiations and as an implementor of final agreements.

HHE   Employee Negotiating Organizations

Use for a statement that identifies staff units recognized by the Board as negotiating organizations. The method of determining units may be included.

HI   Rights and Responsibilities of Employee Negotiating Organizations

Use for a statement on the rights and responsibilities of employee bargaining organizations that may be available from the school system. Released time for organization purposes, use of staff bulletin Boards, school mail service, etc., may be included.

HJ   Payment of Negotiating Costs

Use for a statement on what costs will be borne by the Board and what by employee groups, such as the cost of printing final agreements.

HK   Release of Negotiations Information

Use for a policy that sets out ground rules concerning the release of information while negotiations are in progress. Do not use in place of Announcement of Negotiated Agreement/HM.

HKA   Media Relations during Negotiations

Use for a policy outlining the process for releasing information to the press. Include a designation of the staff members and/or school officials responsible for media relations during this period.

HL   Preliminary Negotiated Agreement Disposition

Use for a statement on the process by which recommendations produced by negotiators are presented to the parties that will ratify them.

HM   Announcement of Final Negotiated Agreement

Use for a statement related to public announcement of completed agreements.

HN   Negotiated Agreement Implementation

Use for a statement establishing procedures for agreement implementation and enforcement; means for providing agreement interpretation; efforts at coordination to reduce misunderstandings and grievances.

HO   Impasse Procedures

Use for a statement describing what steps — mediation, fact finding, and/or arbitration — will be followed should there be an impasse between the parties in negotiations.

HOA   Binding Arbitration

Use for information as to the circumstances and procedures governing the intervention of an outside mediator with the authority to make a final ruling. Relevant portions of state laws and regulations should be included.

HP   Employee Job Actions

Use for a policy relating the Board's philosophy on the importance of not having disruptions to the instructional program. Also include the Board's planned response in the event of any actions such as slowdowns, walkouts, strikes — or assign this matter to a separate policy.

HPA   Employee Walkouts, Strikes, and Work-to-the Rule

HQ   Negotiated Amendments and Renegotiations Procedures

Use for a statement dealing with the manner in which either party may reopen a master contract for the reconsideration of items.

I — Instruction

Section I contains policies on the instructional program: goals, basic program; special programs; instructional arrangements and resources; and testing/assessment of individual student achievement as well as the district's instructional program. But extracurricular/cocurricular activities and guidance services are filed in Section J/Students. The policies in this section, more than in any other, will reflect the school system's and school Board's reason for being.

IA   Instructional Goals and Learning Objectives

Use for statements on instructional (educational) goals and objectives as well as for a listing of the priority concerns determined by the Board. The process for goal setting in this area may be included, but methods to evaluate the instructional program should be described in the category of Evaluation of Instructional Programs/IL.

IB   Academic Freedom

Use for a policy that defines and clarifies the implementation of this concept in the school system. Related categories are Teaching about Controversial Issues and Public Concerns/Complaints about the Curriculum and Instructional Resources.

IC   School Year

Use for policies outlining the length of the school year, number of instructional days, and the pattern of instructional time — for example, if an extended calendar or year-round school are the norm. Do not use for information on the school day.

ICA   School Calendar

Use primarily for exhibits showing instructional days, holidays, and staff work days.

ICB   Extended School Year

Use for a policy indicating a longer than required (by the state) school year. Include programs offering optional programs that do not qualify as summer school. But do not include year-round school, which should be described in a separate policy.

ICC   Year-Round School

Use for information on the calendar system under which schools operate all year long. Include provisions for staff working assignments and special operational considerations, although much of this information might also be cross referenced in the appropriate staff or support services section.

ID   **School Day**

Use for a policy on the length of the school day for students at various levels; may include how specific opening and closing hours are determined. For the staff working day, use Professional Staff Time Schedules and Support Staff Schedules/GCL/GDK.

IDA   **Evening Instructional Activities**

Use for classes or instructional resource periods for students (e.g., homework assistance hours) scheduled in the evening hours. Do not use in place of adult education classes.

IE   **Organization of Instruction**

Use for a policy that sets the school system's basic pattern of grade level organization — kindergarten to 5th or 6th grade; 6th or 7th grade to 8th or 9th grade; and 9th or 10th to 12th grade — i.e., elementary; middle school or junior high;and high school. This policy should include information on whether the district operates any alternative schools, special vocational schools, adult schools, a community college, preschools, etc. Larger districts sometimes include a list of all schools (noting levels, special purpose) as an exhibit with this policy.

IF   **Instructional Approach**

Use for information on the philosophy or instructional methods that guide the design of the educational program. One or more of the following categories may be used to describe approaches in detail.

IFA   **Heterogeneous/Homogeneous Ability Grouping**

IFB   **Active/Passive Learning**

IFC   **Multiculturalism**

IFD   **Continuous Progress Education**

IFE   **Nongraded Education**

IG   **Curriculum Development, Adoption, and Review**

Use this sequence for related policies on curriculum development and approval. The general category can be used for a policy expressing the Board's support for curriculum studies, setting forth methods by which revision is accomplished, and locating administrative and committee responsibilities.

IGA   **Curriculum Development**

IGB   **Curriculum Research**

Do not use this or the category of Pilot Projects to file policies better placed under Professional Staff Research and Publishing/GCS. Curriculum research and pilot projects refer to efforts authorized under the guidance of the school district for the sole purpose of furthering the instructional program.

IGC   **Pilot Projects**

IGD   **Curriculum Adoption**

Use for a policy outlining the process by which a course of study is formally approved by school officials. Might include relevant committee referrals or review by administrators, teachers, and finally the school Board.

IGE   **Curriculum Guides and Course Outlines**

Use for a policy on the preparation and use of guides and outlines designed to implement the specific objectives of course study. A

related code is Handbooks and Directives/CHCA.

IGF   **Curriculum Review**

Use for a policy describing the overall procedures — both formal and informal — for evaluating the district's curriculum and for offering suggestions for improvement.

IH   **Curriculum Programs**

Use for a general policy on the curriculum offerings available to district students. Include relevant curriculum goals as well as the available resources. Use one or more of the following policies to set forth specific programs:

IHA   **Basic Instructional Program**

Use for a general policy on the types of courses and requirements that constitute the district's basic instructional program.

IHB   **English/Reading/Writing/Language Arts Education**

IHAB   **Mathematics Education**

IHAC   **Social Studies Education**

IHAD   **Science Education**

IHAE   **Physical Education**

IHAF   **Arts Education**

IHAG   **Music Education**

IHAH   **Foreign Language Education**

IHAI   **Vocational-Technical Education**

IHAJ   **Computer/Technology Literacy**

IHAK   **Citizenship/Values Education**

IHAL   **Teaching about Religion**

Do not use in place of School Ceremonies and Observances/IMD, which includes the observance of religious holidays in schools.

IHAM   **Health Education**

IHAMA   **Teaching about Drugs, Alcohol, and Tobacco**

IHAMB   **Family Life/Sex Education**

IHAMC   **HIV/AIDS Education**

IHAN   **Driver Education**

IHAO   **Environmental Education**

IHAP   **Consumer Education**

IHAQ   **Career/Transition-to-Work Education**

Use for curriculum emphasizing work place habits, know how, and opportunities. Often schools will cooperate with local businesses to develop appropriate and timely materials. Includes work experience opportunities and cooperative education programs but not work-study programs not tied to curriculum — include these under Employment of Students/JO.

IHB   Special Instructional Programs

This code establishes a category covering all areas outside the basic instructional program, many requiring special personnel and services for students. Most districts will want to include general program goals and use the specific policies that follow for topical areas.

**IHBA   Special Education/Programs for Handicapped/
              Disabled Students**

The terminology varies for students with special needs. Usually these policies describe the types of programs and arrangements as well as planning and placement, due process rights of parents, outside placement, and evaluation. Relevant state and federal law should be included.

IHBB   Gifted and Talented Education

Use for policies describing the programs and resources allocated for students benefiting from advanced or in other ways special instruction. This education option usually takes the form of a "pull-out" program. Include all types of enrichment such as art, music, math, science, languages, etc. But don't confuse this category with Honors Program/IHCC, a defined and integrated curriculum for students with superior academic ability, as defined by the school district. Do not use this in place of advanced placement courses, postsecondary options, or concurrent enrollment in college.

IHBC   Programs for At-Risk/Disadvantaged Students

Use to describe programs focusing on students identified as at social, economic, or emotional risk of failure in school. This policy should describe the identification and counseling components of helping students with problems to succeed in school. Do not use in place of compensatory education programs (listed in the next code).

IHBCA   Programs for Pregnant/Parenting Students

IHBCB   Programs for Substance Abusers

IHBCC   Programs for Children in At-Risk Families

IHBDA   Compensatory Education

Use to describe the education programs designed to correct the educational deficiencies in a student's academic achievement. The goal of these efforts is to bring the student to or above grade level. This code establishes a general category; some districts will want to use one or more of these specific codes instead:

IHBDA   Remedial Instruction

Use for planned programs, not the type of individual help customarily extended students by their teachers.

IHBDB   Tutoring Programs

Use for tutoring programs that are part of the school day whether the tutor is a teacher or resource staff. Do not use for a policy on the private tutoring of students by teachers or by others.

IHBDC   Acceleration of At-Risk Students

Include programs that place at-risk students in a compressed, faster pace classroom setting that in some districts has improved their ability to learn and academic achievement. Do

not use for policies on grade advancement (skipping) or other enrichment programs for above grade level students.

IHBE   Bilingual Instruction

Use for statements on the purpose and extent of the bilingual program that also may be cultural in nature. In such programs both English and another language are used as mediums of instruction, and proficiency in both languages is a program aim.

IHBEA   English as Second Language

Use for programs in which instruction is offered in the student's native tongue, but the aim is proficiency in English.

IHBF   Homebound Instruction

Use for policies on providing instruction to students who are unable to attend school for health or other reasons. Do not use in place of Home Schooling/IHBG. Information on the type of instruction provided, scheduling, personnel, and evaluation techniques is relevant.

IHBG   Home Schooling

Use for information on the process used to approve/disapprove parental requests to teach their child/children at home. This will be affected by state law as well as by the district's instructional program. Include access to district resources, methods to evaluate student progress, and reporting requirements.

IHBH   Alternative School Programs

Use for programs providing nontraditional places for and approaches to the instructional program. These are designed to meet students with behavior or lifestyle needs that make traditional school practices an impediment to learning. Include identification and selection of students for these programs as well as any departures in evaluation techniques. Also describe how staff are selected for these schools and what, if any, unusual resource allocations they require.

IHBHA   Alternative Schools

IHBHB   Magnet Schools (admission procedures are
              filed under JFBD)

IHBHC   Weekend/Night School

Can include programs relating to preschool and primary grades 1st to 4th, all of which qualify as early childhood education. Include information on curriculum, teacher training, resource allocations, and the variety of special needs relevant to this age group. Some districts will adopt special grading procedures, for example, a practice which would be cross referenced in the appropriate sections. Programs that have as their primary objective child care, however, should be filed under Child Care Programs/IHCF.

IHBIA   Kindergarten Programs

Include goals for the kindergarten program, eligibility criteria such as age or developmental testing, etc. Curriculum and other consider-ations also should be described.

IHBIA   Half-Day/Full-Day Kindergarten

Use for information on scheduling, busing, etc., particular to districts with half-day or full-day programs.

IHBIB   Primary/Pre-Primary Education

Use to describe all preschool programs that have an educational component operated either by the school district or in cooperation

with other agencies or child care providers.

IHC   Extended Instructional Programs

The general code covers all programs considered as extensions of the regular school program and as options that depend on student interests, abilities, and available resources. Add as many additional codes as needed to accommodate other extended programs. However, if school system involvement is limited to providing facilities, include with Community Use of Schools/KF or School-Based Child Care Program Administration/CGB.

IHCA   Summer School

Use for statement dealing with curriculum aspects of the summer program; may cover admission criteria. Do not use in place of Summer Programs Administration/CGA, which relates to how the program is managed and supervised.

IHCB   Travel Study

Use for school-sponsored or school-approved programs offering students academic credit for travel.

IHCC   Honors Program

Use to describe a curriculum developed to enrich the overall instructional program of superior academic achievers. Do not confuse with Honors and Awards/JM, which should be used to describe specific honors conferred on students at a designated time of year rather than a course of study. Also keep separate from Gifted and Talented Education/IHBB, which refers to enrichment specific to an area of exceptional ability or to a "pull-out" program rather than to the student's entire class schedule.

IHCD   Advanced College Placement

Use for programs giving qualified students the chance to earn college credit while in high school Include cooperative agreements with local institutions. Advance College Placement refers to courses that prepare students to take an exam that, if they score high enough, will be counted as college credit in most institutions. In Postsecondary Options/Concurrent Enrollment programs students actually take college courses at nearby higher education institutions.

IHCE   School Camps

IHCEA   School-Sponsored Camps

Include methods to decide what camps the school district will sponsor as well as risk management practices when appropriate.

IHCEB   Camps Conducted by Outside Groups/Organizations

Use to set eligibility criteria and an approval process for groups wanting to operate camps on school property.

IHCF   Child Care Programs

Use for programs that do not have an explicit educational component but are related to the instructional program by virtue of their operation before- or after- school or because the quality of the preschool years is considered crucial to a child's school performance.

IHCFA   School-Based Child Care

IHCFB   Latchkey Programs

IHCFC   Preschool Child Care

IHD   Adult/Community Education

Use to describe the district's role in providing educational programs for adults in the community and to describe the overall purpose. The following specific codes reflect the varying types of programs. One or more may be used. Include information on curriculum and admissions; credits, certificates, or diplomas; and fees. Use Adult Education Program Administration/CGC to describe the management side of adult/community education.

IHDA   Adult Basic Education

IHDB   Adult High School/GED Programs

IHDC   Adult Vocational/Career Education

IHDD   Community Education

Include general classes or enrichment designed to serve various constituent groups, such as senior citizens or photographers, for instance, that may not be tied to a career or job.

II   Instructional Arrangements

This establishes a general category for specific and divergent topics. It is useful to have a broad policy that encourages flexibility in methods for delivering instruction. Use the specific codes as needed.

IIA   Grouping for Instruction

Use for ability-level or other types of student grouping strategies, both by classes and within classes. Will give the implementation strategies for a policy on Heterogeneous/Homogeneous Ability Grouping/IFA under Instructional Approach.

IIB   Class Size

File a policy that emphasizes class size on the basis of meeting instructional needs of students as well as of any constraints imposed by state law or negotiated agreements. File a policy that emphasizes class size on the basis of teacher work load under Professional Staff Work Load/GCM. Many districts will want to include this policy in both places. Specify class size ratios according to relevant grade level areas.

IIC   Scheduling Classes

Include information on the scheduling of classes, courses, and subjects by the school. May include the number of hours that reading, mathematics, science, etc., must be taught per day or week at elementary levels. Some school systems file policies on Time for Learning or Time on Task in this section.

IID   Pull-Out Programs

Use for a statement on the philosophy towards or the number of program pull-outs allowed that disrupt a student's daily or weekly instructional time. Also describe the types of pull-out programs permitted.

IIE   Student Schedules and Course Loads

Use for schedules and course loads required of students; for policies pertaining to student preference in scheduling; also may be used for the development and maintenance of long-term educational plans by individual students.

IIF   Team Teaching

Use to describe a program pairing one or more teachers with a

number of classes. Instructional approach and planning time allocations may be included as well as how members of the teaching team are paired.

IIG   Differentiated Staffing

Use for a policy on the team-teaching type program that assembles different types of instructional staff into a team, for example, a master teacher, a regular teacher, a student teacher, and a teacher aide. Also specify their varying responsibilities, particularly for student evaluation.

IIH   Mixed Classes
Use for information on combining grade levels for part or all of instruction.

III   Independent Study

Use to describe the circumstances under which students are permitted to work alone either in the classroom, a resource center, or a computer lab. Include measures taken to monitor student progress.

IIJ   Individualized Instruction

Use to express a district's teaching philosophy on the importance of adapting instruction to meet individual student needs. Districts with specific programs for achieving this goal should describe the details here.

IIK   Contracting for Instruction/Performance Contracting

Use Contracting for Instruction for a policy on contractual arrangements that have the effect of simply adding to present staff capabilities, such as a contract with a private driver training school. Use Performance Contracting to cover a results-oriented instructional approach where teachers involve students and parents by agreeing to learn a certain amount of material in a designated time period. (If both policies are needed, add another policy code, IIKA.)

IIL   Open Classrooms

Use for policies on schools having temporary, moveable walls or having significant amounts of open space that allowing for different teaching styles but that also put a premium on student conduct and low noise levels. Include teacher training, parent information, and special instructional arrangements.

IIM   Nongraded Classrooms

Use for policies or pilot projects where alternative or nongraded (no numerical or alphabetical grades) types of assessments of student progress are used.

IIN   Cooperative Learning

Use to describe instructional programs emphasizing group learning and self-directed activity by students.

IID   Peer Tutoring

Include information on student to student instructional assistance, whether the relationship is between students in the same or different grade levels. But file policies on peer counseling under Guidance and Counseling/JLDBE.

IJ   Instructional Resources and Materials

This establishes a general category covering those school resources and materials (including equipment) that are of interest to the community-at-large as well as to students and staff. Some of the specific policies may be cross referenced or duplicated in Section K/ School-Community-Home Relations under Public Concerns and Complaints/KE and Community Use of School Facilities/KF. Include in each academic area the selection and evaluation methods specific to it. Also list the types of resources that provide a solid foundation for effective instruction. General approval and selection methods, however, should be described in Textbooks/IJI; Supplementary Materials/IJJ; Library Materials/IJL; or Special Interest Materials/IJM.

IJA   Language Arts Resources and Materials

IJB   Mathematics Resources and Materials

IJC   Social Studies Resources and Materials

IJD   Science Resources and Materials

IJE   Arts and Music Resources and Materials

IJF   Physical Education Resources and Materials

Some districts will combine Physical Education and Health Education.

IJH   Foreign Language Resources and Materials

IJI   Vocational-Technical Resources and Materials

IJJ   Textbook Selection and Adoption

Use for a statement of principles underlying the selection of texts and other primary instructional material. Also clearly specify the process for selection and approval. Use Public Concerns/Complaints about Instructional Resources/KEC for statements on that topic; cross references are helpful. Use Maintenance and Control of Materials and Equipment/EDB for statements relating to textbook control. Use Student Fees, Fines, and Charges/JQ for information on lost or damaged materials.

IJK   Supplementary Materials Selection and Adoption

Use for all extra materials — print and nonprint (including films, videotapes, computer software, etc.). If the same policy/regulations cover both textbooks and supplementary materials, combine this policy code with the one above. Treat "maintenance eand control"/ EDB, "complaints about"/KEC, and "charges"/JQ for supplementary materials as described above for texts.

IJKA   Technology Resource Selection and Adoption

Use for a district short- or long-range plan to integrate and acquire technology resources for instruction. But include how resources will be chosen and integrated into the curriculum under Use of Technology Resources in Instruction/IJNDB.

IJL   Library Materials Selection and Adoption

IJM   Special Interest Materials Selection and Adoption

Use for related areas of curriculum, usually selected by teachers, that are incorporated into the instructional program. This applies to all materials provided free or otherwise by private companies, trade associations, patriotic, religious, and other special interest groups. File policies on the distribution of special interest materials not related to classroom instruction under Distribution/Posting of Promotional Materials/KHC.

IJN   Instructional Services

This establishes a general category relating to the delivery of instruction; some districts will want to use one or more of the

following specific codes instead:

IJNA   Teacher Aides

Use for a policy authorizing and clarifying the purposes of the teacher aide program. This policy might describe the general functions that aides perform, but the category usually should not include the job description or personnel policies relating to aides. These belong in Section G/GDA.

IJNB   Resource Teachers

Use for a policy authorizing and clarifying the purposes of resource teachers. This policy might describe the general functions that resource teachers perform, but the category usually should include the job description or personnel policies relating to resource teachers. These belong in the G Section/GCAAC. Describe the location in the school building where the resource teachers meet with students as well as how they evaluate student progress and convey these assessments to teachers and parents.

IJNC   Resource Centers/Media Centers/School Libraries

Districts use varying terms for this instructional area; one ore more may apply in your district's situation.

IJNCA   Professional Library

Include the education resources available to staff members only. Some districts will prefer to locate this under Professional Staff Facilities/GCV.

IJND   Technology Resources

Use for policies on all types of technology-based instructional resources including videotapes, computers, software, radio, cable TV, satellite transmissions, etc.

IJNDA   Computer-Assisted Instruction

Use for a policy on the use of computers in various curriculum areas as an aid to learning. Policies on programs to teach about computers and their use are filed under Computer-Technology Literacy/IHAJ.

IJNDB   Use of Technology Resources in Instruction

Use to outline the district's philosophy and plan to incorporate technology resources into the curriculum. Include teacher training and curriculum adaptations that are necessary.

IJO   Community Learning Resources

This category establishes a general policy endorsing the use of local resources as a part of the instructional program whenever possible.

IHOA   Field Trips

Use for setting forth criteria qualifying a field trip as instructional in nature as well as for an administrative and parental approval process. Procedures should be in place to accommodate students who do not receive parental approval. Risk management and transportation issues also are relevant, although the latter is more appropriately addressed in Special Use of Buses/EEAF if school district transportation is used. Other policy considerations are the use of chaperones; student charges (some districts do not charge if the trip falls within the basic instructional program); and curriculum reinforcement.

IJOB   Community Resource Persons/Speakers

Use to describe the goal of identifying and using community resource persons as part of the instructional program. Development of school speakers' bureaus and other methods to achieve this goal are included.

IJOC   School Volunteers

This is designed for guidelines on the use of volunteers in the classroom as well as in a variety of other school programs and services. Outline how volunteers are recruited, trained, supervised, and thanked.

IK   Academic Achievement

This establishes a general category relating to assessing and reporting on the progress of students in their classes. It does not include district-wide assessments or other nationally- or state-normed exams that are intended to measure the effectiveness of the district, state, or nation's education program. Include the Board's philosophy on this topic. Also indicate how student achievement measures fit within the district's curriculum objectives. Use the following specific codes as necessary:

IKA   Grading/Evaluation of Students

As districts move away from sole reliance on traditional grading measures of student achievement, the policy title might change to "evaluation" or "assessment." Use of student work portfolios and teacher comments/diaries, for example, are described.

IKAA   Tests and Examinations

Use to outline the district's testing program to determine student grades. Specify the function of testing and establish controls over this activity. Statements on teacher-made, district-developed, and standardized or publisher tests are relevant. Also include requirements for proctoring and monitoring of tests/examinations.

IKAB   Report Cards/Progress Reports

Specify the type of report cards/progress reports appropriate to the various grade levels of instruction. Also describe the reporting schedule. Include relevant exhibits of the documents as well as the process for revising/reviewing the reports. Note any required parent conferences that correspond to the release of the reports and to ways for students and parents to determine the accuracy or substantiation of the grades. The procedures used to change a grade can be filed here or under Grade Adjustment/IKAD.

IKAC   Conferences

Use for information on conferences initiated by teachers, students, or parents throughout the year. Specify a required number of calendar period as well as the scheduling and protocols associated with such conferences. Districts can include telephone conferences and other forms of communication. A policy on teacher conferences with other teachers is filed under Professional Staff Planning Time/GCMA.

IKACA   Parent Conference

IKACB   Student Conferences

IKAD   Grade Adjustment

IKB   Homework

Use for statements on the Board's approach to the assignment of homework. Include daily/weekly minimums and maximums

appropriate to different grade levels as well as guidelines on the type of homework assigned and whether (or how) it is evaluated and returned to students. Describe types of long-term assignments and projects and provide information on how much assistance from parents is desirable.

IKC   Class Rankings/Grade Point Averages

Use to specify the procedures to determine cumulative grade point averages and class rankings. Establish a review process if disputes arise. Also include information on how any special academic programs such as weighted grades, advanced placement, or pass/fail classes that affect these areas.

IKD   Honor Rolls

Use to set the eligibility criteria for various recognition programs for academic achievement. Also include how names will be publicized or how other rewards — such as a pizza party — are distributed.

IKE   Promotion, Retention, and Acceleration of Students

The content of policies may include promotion requirements, expected competencies, and required credits to attain specific class standings. Provide detail on the notifications to parents required when a student is in jeopardy of retention. Also include alternative means to accommodate a student's need for remedial or advanced work without grade acceleration or retention. Procedures to handle parent requests for student acceleration should be outlined here.

IKF   Graduation Requirements

Use for both the credit and/or competency test requirements established by state law and district policy. If special graduation requirements pertain to handicapped students, include them here and note a cross reference under Special Education/IHBA.

IKFA   Early Graduation

IKFB   Graduation Exercises

Include distinctions between nonschool-sponsored baccalaureate services and other district-controlled ceremonies. Use for guidelines on speakers, planning, expenses, and charges.IL Evaluation of Instructional program

Use in place of a similar code that, if following the pattern of the other main policy sections, would appear under Instructional Goals and Learning Objectives/IA. This topic applies to evaluation conducted to assess the district's instructional program as a whole rather than to assess the progress a student has made in a particular class. Do not confuse with Academic Achievement/IK. The critical and detailed nature of these policies warrant their consideration as separate policy topics. Many districts will have a variety of testing programs located here, e.g., nationally mandated, state-mandated, and district-mandated assessments. The testing schedule for different grades should be outlined.

ILA   Test/Assessment Selection

ILB   Test/Assessment Administration

ILBA   District Program Assessments

Include assessments mandated by the school Board as necessary to evaluate the effectiveness of the district's education program. Some of these tests may be developed by district staff.

ILBB   State Program Assessments

ILBC   National Program Assessments.

ILC   Use and Dissemination Assessment Results

Use for information on how the district reports and interprets test scores. Include information sent to parents as well as its communication to the press and other community/political officials.

ILD   Educational Surveys and Research

Use for information only on how reports and surveys are used to improve the instructional program. Schools subscribing to the Effective Schools design should affirm those principles here but also in Section A/ADE as part of the school district philosophy or mission. Use this category to state the Board's intent to stay current with instructional research as well as any efforts undertaken by the Board to survey the school community or staff on ways to improve the instructional program. Such a policy should be cross referenced to Polling and Survey Research/KCBB and Staff Involvement in Decision Making/GBB. If the survey goals are broader than curriculum, locate the policy in the other categories.

IM   Miscellaneous Instructional Policies

This is a general category that serves only to locate instructional policies that do not fit into the other sections.

IMA   Teaching Methods

Use for policies on teaching methods that do not logically harmonize with one or more of the codes under Instructional Approach/IF.

IMB   Teaching about Controversial/Sensitive Issues

Use for guidelines on how teachers or other instructional personnel should approach controversial issues in the classroom as well as on how they should handle unusually situations or questions from students or parents. Also use to establish controls to protect students from indoctrination. Use Controversial Speakers/Programs/IMC for policies on outside programs. Neither should be used in place of Academic Freedom/IB, although they may be cross referenced there. Districts that provide alternative learning experiences usually will have a separate detailed policy on this topic.

IMBA   Alternative Learning Experiences

Use to specify the grounds for requesting a substitute activity in place of what is prescribed by the teacher or by the district's curriculum. Describe the process to evaluate the requests. Do not use in place of a request for an exemption from the instruction all together.

IMBB   Exemptions from Required Instruction

Frequently used for required health/sex education instruction. Include details relating t the review process as well as to what instructional activity the student will be engaging in should the request be approved.

IMBC   Opt-Out Procedures for Alternative Instruction

Use for approval procedures that give parents the up-front choice of allowing or prohibiting their child's participation in a school program. Only students whose parents sign the required forms receive the instruction. Include exhibits of the forms and provision for activities for the students whose parents opt them out of the instruction.

IMC   Controversial Speakers/Programs

Use for information on the Board's approach to exposing students to

controversial issues, ideas, and personalities. Include specific review procedures and notifications to parents about the programs.

IMD   School Ceremonies and Observances

Use for a policy dealing with such matters as school programs, ceremonies, and decorations connected with religious holidays, patriotic celebrations, or other types of observances. Moments of meditation, morning exercises, and the like should be clearly defined. Use specific policies as needed. This category is sensitive to state and federal court decisions, so consult your school attorney during policy development.

IMDA   Patriotic Exercises

IMDB   Flag Displays

IMDC   Religious Observances and Displays

IME   School Assemblies

Use for information on school gatherings during instructional time, whether for instructional, informational, extracurricular, or another purpose.

IMF   School Fairs

Use to clarify the Board's position on the value of the activity. This refers to school-sponsored fairs rather than to fairs conducted by outside groups (file these under Contests for Students/JJG). Policies on science fairs and writing contests often are filed here.

IMG   Animals in Schools

Use for a policy on the treatment of animals used for instructional or experimental purposes in classrooms, laboratories, and during student activities, if the policy permits bringing of animals onto school property. Include guidelines on when students and teachers can bring animals into school either for the day or for longer periods of time. Establish responsibility for their care. Policies on animal dissection — and handling student objections to this practice — should be filed under Teaching about Controversial/ Sensitive Issues/IMB.

IMH   Class Interruptions

Use for a policy related to minimizing interruptions during the teaching/learning process. Include parent and other forms of communication with students as well as school announcements over a public address system. Do not use instead of Pull-Out Programs/IID.

J — Students

Section J contains statements about students — for whom the schools exist. Section J policies deal with admissions and attendance, rights and responsibilities, conduct and discipline, guidance and counseling, and student activities.

JA   Student Policies Goals/Priority Objectives

Use for a statement on goals and objectives specifically related to student policies. Use to describe the process for determining these goals, if a special type of policy development process occurs involving student advisory counsels or meetings with student groups.

JAA   Evaluation of Student Policies and Services

JB   Equal Educational Opportunities

Use for a policy on equal education opportunity for students without regard to race, creed, sex, national origin, social or economic status, or disability/handicap. A broad policy addressed to equivalence among schools may be included here, although a policy that deals with specific allocations or gifts is more appropriately coded elsewhere, for instance, School Building Administration/CF or Budget Implementation/DBI, or Public Gifts/KCD. Also see Nondiscrimination/AC. While a policy in JB may refer to racial integration, if the means to achieve integration involves school attendance areas, Desegregation Plans/JCAB.

JBA   Discrimination on the Basis of Race, Ethnicity, Handicap, Religion, or Sex

File specific policies on these topics and any relevant state or federal law/court decisions as appropriate. Particular priority concerns of the school district and general programs should be described.

JC   School Attendance Areas

Use for information on the drawing of individual school boundary lines to determine student attendance, reviewed, and changed. However, districts with open enrollment/choice programs should file them under School Choice/Open Enrollment/JFB. This category applies only to districts that determine school attendance by using attendance boundaries.

JCA   Assignment of Students to School

Use to focus on the assignment of individual students to schools rather than the drawing of attendance areas. Individual concerns and gray areas such as students who attend before- and after-school day care centers or who are with a sitter or relative in another school's attendance area should be identified and the resolution procedures explained.

JCAA   School Districting/Redistricting Procedures

Use for policies on how the Board conducts redistricting, either when schools are opened, closed, or when enrollment patterns shift. Enrollment projection studies, public meetings, and resolution of concerns all should be addressed since this policy topic is known to a troublesome.

JCAB   Desegregation Plans

Use for court-, state- or district-initiated programs to achieve better racial balance among district schools. Mandatory busing is filed here along with communication programs to enhance community acceptance.

JD   School Census

Use for a statement indicated frequency and method for obtaining a periodic census of preschool and school-age children. A related code is Enrollment Projections/FBB.

JE   Student Attendance

Use for information on mandatory ages of school attendance. Do not use in place of Truancy/JHB. Exemptions to mandatory ages should be treated under Exclusions and Exemptions from School Attendance.

JEB   Entrance Age Requirements

Use for a policy or information on the age of entrance to the district's preprimary, kindergarten, and/or first grade. May include

exceptions for underage children, age when handicapped children are entitled to special programs and services, etc.

JF   Student Admissions to/Withdrawals from School

This establishes a general category relating to how students are admitted to individual schools and under what circumstances they can withdraw from that school. Districts with traditional attendance areas will want to have policies in this section in addition to School Attendance Areas/JC — the latter refers to the process of determining which school a student attends; this code refers to general admission procedures relevant to all types of programs, including open enrollment/choice. Requirements for health, immunization certificates, and proof of residency should be filed here. Specific policies on Physical Examinations of Students/JLCA and Immunization/JLCB are filed separately; under those codes; admission to adult education programs, summer school, and special education is better described under those topics. One or more of the following policies may be used:

JFA   Admission Procedures

JFAA   Admission of Resident Students

File specific definitions of residency.

JFAB   Admission of Nonresident Students

Use for exceptions to residency requirements; may include policy on payment of tuition or accommodation of homeless students. Districts with programs responding to their special educational needs should describe these efforts under Homeless Students/JLG. Can include statements on the mutual transfer of students between with districts under interdistrict agreements or state requirements. These policies can be filed separately as follows.

JFABA   Nonresident Tuition Charges

JFABB   Admission of Exchange and Foreign Students

Use for information on any formal exchange program.

JFABC   Admission of Transfer Students

JFABD   Admission of Homeless Students

JFB   School Choice/Open Enrollment

Use for programs giving families some type of choice in where their child attend schools. Relevant state law should be included. All components of an initiative should be described, ranging from communicating information to parents and students about schools and open enrollment periods to the constraints of ensuring racial balance and changes in funding formulas. Also state for how long the student is committed to attending the school of choice and any provisions for school transportation. See the Code-Finder Index for definitions of each type of choice program.

JFBA   Intra-District Choice/Open Enrollment

JFBB   Inter-District Choice/Open Enrollment

JFBC   School Choice Voucher Programs

JFBD   Magnet School Programs

JFC   Student Withdrawal from School/Drop-Outs

Use for any policy concerning procedures to officially withdrawn from school or the measures used to determine a student's "drop-out" status. Programs designed to serve these students are filed under At-Risk Student Behaviors/JLDB.

JFCA   Student Re-Entry to School

Use for information on how a student officially is readmitted to school after being withdrawn or dropping out.

JG   Assignment of Students to Classes and Grade Levels

Use for guidelines on how to assign both new and continuing students to appropriate grade levels and classes. Include materials necessary to make these judgements, such as transcripts, teacher recommendations, acceptance of credits from private schools, unaccredited schools, home schools, and other situations. Communication with families and avenues for appeals of decisions also are relevant. Procedures allowing parents to request a teacher are located here as is other information on how assignments to classes are made. Grade promotion of continuing students usually is treated under Academic Achievement/IK.

JGA   Assignment of Students to Classes and Grade Levels

JGB   Assignment of Continuing Students to Classes

JH   Student Absences and Excuses

Use for statements on the importance of regular school attendance, appropriate enforcement methods, and approved reasons for absence. Include statements on tardiness and class cutting; absence for religious holidays, family trips, or other family reasons such as visitation rights of separated/divorced parents; and required written excuses and make-up work. Attendance requirements for purposes of course credit also may be included. Attendance monitoring and accounting for state funding allocations and other required reports usually are filed in a specific policy under this category. Some districts will want a comprehensive policy using the general code; others will want specific policies in the following areas:

JHA   Tardiness

Use for a definition of tardiness, penalties for violations, etc.

JHB   Truancy

Use for a definition of truancy and statements concerning enforcement of the compulsory attendance law.

JHBA   Attendance Officer

JHGBB   Attendance Monitoring/Accounting

Use for a policy on the recording and accounting of attendance for state and district purposes.

JHC   Released Time for Students

Use for guidelines on any special categories of students that may report to school late, be dismissed early, and/or be released at odd hours on a regular basis for special purposes (except for religious instruction, which is covered by another code). Related categories are Career/Transition to Work Education/IHAQ and Employment of Students/JO.

JHCA   Open/Closed Campus

Use to describe arrangements for a closed or open campus, the latter where certain grade levels of students are permitted to leave school property at designated times during the day.

JHCB Released Time for Religious Instruction

Use to describe arrangements that enable students to leave school grounds to receive religious instruction. Do not use in place of Teaching about Religion/IHAL. A closely related code is Relations with Churches/KJC.

JHD Exclusions and Exemptions from School Attendance

Use for a policy or information statement concerning those categories of students who are exempt from the requirements of the compulsory attendance law and/or who may be excluded under free public schooling laws. However, do not use in place of Student Expulsion/JKE. For exemptions from required courses, use Exemptions from Required Instruction/IMBB. Arrangements for placement in special education programs, and outside placement, belong under Special Education/IHBA.

JI Student Rights and Responsibilities

Use for an umbrella policy outlining the rights and responsibilities of students as they apply to the major areas of school life. This statement may refer to and summarize a major document on the topic that is made available to all students and parents. Specific portions of such a publication would be filed in policies in this section with cross references provided. But place a policy on Student Press Freedom under Student Publications/JICE.

JIA Student Due Process Rights

Use for a general statement unless except as the topic is ad-equately covered under the general code on Student Rights and Responsibilities. The concept of due process for students is essentially legal, referring to the procedures and avenues for appeal that administrators must follow for certain types of disciplinary actions. This policy should be developed in consulta-tion with a school attorney and will impact other policies on suspension, discipline, and expulsion.

JIB Student Involvement in Decision Making

Use for a general policy summarizing ways students are involved in school and district decision making. Include policies on student representation on the school Board, student advisory councils, hand student government, but because of their different activities most districts will want to have separate policies on each.

JIBA Student Government

JIBB Student Member of School Board

JIBC Student Advisory Councils

JIC Student Conduct

An umbrella policy where the Board sets goals and standards for students as well as linking good conduct to a successful educa-tional program. Some Boards will prefer to assign some or most of this topic to Student Discipline/JK; others will locate it in both places to emphasize the positive side of conduct. Do not include discipline policies in this code. Use one or more of the following policies:

JICA Student Dress

Include the process for determining appropriate dress standards at the varying grade levels. Present any dress codes the Board adopts as exhibits. If principals are given discretion on these matters, make that clear in this policy.

JICB Care of School Property by Students

This category relates to carelessness and thoughtless damage. Do not include measures for textbook control (use Maintenance and Control of Materials and Equipment/EDB); for intentional damage, use Vandalism/ECAC.

JICC Student Conduct on School Buses (Also EEAFC)

JICD Student Conduct in School

JICDA Code of Conduct

Include as an exhibit any official code that is adopted by the Board and distributed to parents and students.

JICDB Student Conduct in Halls

JICDBA Hall Passes

Include an exhibit if appropriate.

JICDC Student Conduct in the Cafeteria

Policies cover specific conduct standards that apply only in the cafeteria. Rules governing where students can go during the lunch period, for example, and proper disposal of trash are some typical policy provisions.

JICE Student Publications

Use to clearly define the types of student publications and the standards of supervision and control that school officials exercise over each. This area is a subject of judicial scrutiny; consult your school attorney during policy development.

JICEA School-Related Student Publications

JICEB Underground Student Publications

Refer to any nonschool-sponsored printed or other types of materials distributed by students on school grounds.

JICF Secret Societies/Gang Activity

Use to prohibit and enforce student activity in these groups. Allow for communication measures to identify the existence of groups and assign responsibility for counseling to appropriate staff. Related codes include Student Dress/JICA, School Security/ECA, and Maintenance of School Buildings and Grounds/ECB (graffiti).

JICFA Hazing

Use to specifically ban any rituals or ceremonies associated with membership in a nonschool-sponsored group.

JICG Tobacco Use by Students

Use to prohibit or restrict tobacco use by students. Do not use in place of Teaching about Drugs, Alcohol, and Tobacco/IHAMA. Include strong statements on the dangers associated with tobacco addiction.

JICH Drug and Alcohol Use by Students

Use to prohibit drug, alcohol, and look-alike products by students. Do not used in place of Teaching about Drugs, Alcohol, and Tobacco. Include strong statements on the dangers associated with drug and alcohol addiction and its threat to the educational program.

JICI   Weapons in School

Use for a policy banning all forms of weapons on school property. Although specific weapons can be listed, include a general all inclusive term as well. Some districts will want to implement locker or parking lot searches as part of this ban. Include this information under Student Interrogations, Searches, and Arrests/JIH as well. Also provide for communication/ cooperation with local law enforcement agencies on these matters.

JICJ   Use of Beepers in School

Use to ban the possession or use of electronic paging devices on school grounds.

JID   Students of Legal Age

Use for a policy on the expected conduct of, and any special rights that may be enjoyed by, regular students who are 18 years of age or older.

JIE   Pregnant Students

Use to affirm the district's provision of equal educational opportunities to pregnant students. Include any counseling or other education options offered to pregnant students.

JIF   Students with Children

Use to affirm the district's provision of equal educational opportunities to students with children. If school personnel assist with making child care arrangements or the student qualifies for homebound instruction, describe those programs here. Other education options are included as well.

JIG   Married Students

Use to affirm the district's provision of equal educational opportunities to married students. Include any counseling or other education options offered to married students.

JIH   Student Interrogations, Searches, and Arrests

This code covers formal and informal questioning and searches by both school personnel and law enforcement officers. Guidelines for locker searches, searches of persons, and for police investigations and arrest of students are under this category. Related codes are Drug Abuse by Students/JICH and Relations with Law Enforcement Authorities/KLG.

JIHA   Locker Searches

JIHB   Parking Lot Searches

JIHC   Use of Metal Detectors

JII   Student Concerns, Complaints, and Grievances

Use for a policy on the manner in which students may seek satisfaction regarding their complaints and grievances from the administration and Board. Appeals in instances of Student Suspension and Student Expulsion/JKE should be dealt with under those categories. Petitions to the student council and from the student council to the administration or Board are better handled under Student Government/JIBA. Cross references to these policies can be provided.

JIJ   Student Protests, Demonstrations, and Strikes

Use for statements concerning the planned response in the event of such mass or large-scale actions by students.

JJ   Student Activities (Cocurricular and Extracurricular)

Use for general statements on school-sponsored activities that do not have a formal curriculum. These programs can occur either during the school day (cocurricular) or at other times of the day or week (extracurricular). Because they are not required, school Boards have greater discretion in terms of establishing eligibility standards and imposing fees for participation. However, signification policy development often is necessary because of the high levels of parent and student interest in these activities that are often called "the hidden curriculum."

JJA   Student Organizations

Use to define all forms of school-sponsored student organizations, except for Student Government which is located under JIBA. These groups should be connected to the curriculum program although they are not a required part of the instruction. In addition to a full explanation of the how these groups are defined, some districts will list the organizations and any requirements they impose in terms of securing school sponsors or developing charters. Recent court decisions affect the access of groups to school facilities so many districts are developing a separate policy on an open/limited forum. Consult your school attorney during policy development.

JJAB   Limited Open/Closed Forums

JJB   Student Social Events

Use for guidelines on the types of social activities that may occur on school grounds as well as specific standards of conduct and supervision that apply.

JJC   Student Performances/Exhibits/Competition

This category includes performances, exhibits, and competition at school and those given elsewhere except those that are part of the basic curriculum such as science fairs or writing contests.

JJD   Student Activities Fees

Use to specify fees for optional student activities. Provisions for indigent or other disadvantaged students should be included.

JJG   Contests for Students

Use for guidelines on school-sponsored contests that might be initiated by the district or by outside groups. Whereas Student Performances/JJC relates to a student's participation in a competition or exhibit, Contests for Students refers to the criteria for school endorsement of the activities. Policies often prohibit discriminatory activity; require that the contests demonstrate their instructional or civic worth; and not take excessive amounts of teacher time.

JJH   Student Travel

Use for a policy describing under what conditions students may travel to other schools or areas to participate in school-sponsored activities. Limits on amount of instructional time missed and provisions for make-up work are outlined. Financing and transportation issues also are addressed.

JJI   .   Student Athletics

Use for a statement on purposes, controls, restrictions, requirements pertaining to interschool and intramural sports. Include the Board's position on role of athletics in the educational program. May include information on membership in athletic associations, requirements for supervision, insurance, physical examinations. Other special statements may be included or broken out under specific policies. But procedures for handling gate receipts from athletic contests usually are filed under Gate Receipts and Admissions/DFD.

JJIA   Intramural Sports

JJIB   Interscholastic Sports

JJIC   Eligibility/Minimum Standards for Participation

Use only for academic and conduct standards for student athletes that do not apply to students in other activities.

JJID   Student Physicals for School Athletics

JJIE   Drug and Steroid Use in School Athletics

Use for special policies focusing on the use of drugs by athletes. Include prevention, identification, and education programs.

JJJ   Extracurricular Activity Eligibility

Use to describe conduct and/or academic standards regulating student participation in all extracurricular/cocurricular activities. Give specific review periods, typically grading periods, and any waiver or special exceptions policy, if applicable.

JK   Student Discipline

Use as an umbrella category for a set of policies on disciplinary measures. Express a philosophy of discipline in this policy and locate authority to maintain discipline and to impose penalties for violations. Many related categories might be cross referenced, most fall under Student Rights and Responsibilities/JI and Student Conduct/JIC. Some districts will want to combine one or more of the following codes:

JKA   Corporal Punishment

JKB   Detention of Students

JKC   Probation of Students

Provide clear guidance as to the terms of the probation and any restrictions that apply to student activities. Also include what if any indication of the probation is made on the student's school or permanent records. Probation concerns conduct violations not poor academic performance.

JKD   Suspension of Students

Include "in-school suspensions" or this form of discipline can be filed under Detention of Students/JKB if that title better reflects the severity of the offense. Suspension of transportation privileges should be filed under Student Conduct on School Buses/EEAEC, not here.

JKE   Expulsion of Students

JL   Student Welfare/Safety

This code establishes a general category. Use only for a general policy addressing all or most of the topics that follow.

JLA   Student Insurance Programs

Use for student insurance carried by the school system or offered for purchase by families. This code also may accommodate a policy on athletic coverage extended by the district or required of students for participation in athletic programs. Use cross references as needed between these two categories. Do not use this code for liability insurance coverage to protect the district from lawsuits — instead use Liability Insurance/EIB.

JLB   Student Financial Aid Programs

Use for any program providing financial aid to students in need. However, do not use in place of Student awards and Scholarships or Free and Reduced Price Food Service/EFC.

JLC   Student Health Services and Requirements

Use these codes for a set of policies on the student health program. Include a general policy on the program goals and philosophy. It may note services to students provided by the school physician and/or school nurses, but personnel policies for the full- or part-time staff belong in the appropriate personnel sections.

JLCA   Physical Examinations of Students

JLCB   Immunization of Students

JLCC   Communicable/Infectious Diseases

Use to identify the diseases that are transmittable in a school setting. Sometimes an exhibit listing the incubation periods and symptoms are included. Reporting requirements and the formation of a review team to make recommendations on possible exclusion from school are required.

JLCCA   Students with HIV/AIDS

Districts might include HIV/AIDS with the Communicable/Infectious Diseases policy. If a separate policy is adopted, consult your school attorney because this area is regulated by federal law and court decisions.

JLCD   Administering Medicines to Students

Use for information and exhibits regarding what circumstances students may be given medicine at school. This usually applies to both over-the-counter and prescription medicines. A doctor's note and instructions often are called for.

JLCE   First Aid and Emergency Medical Care

Use for information on how student accidents or illness are to be treated until the parent or guardian can be located. Usually an emergency card is filled out at the beginning of the school year and updated as needed by parents. First aid procedures to be undertaken by teachers and by school-based health personnel as well as securing emergency medical treatment at hospitals are described in some detail because of the importance of this topic and the legal responsibility of the schools to protect the student.

JLCF   School Nurses

Use to describe the role of school nurses as well as their part- or full-time assignment to schools. Specify their duties, but include an official job description in the personnel section or in the school personnel manual.

JLD   Guidance and Counseling

Use to authorize and define the function of the guidance program. Clearly demarcate the role of school guidance and counseling vis a vis the provision of public health services at school. In some states school personnel operate under a set of restrictions regarding confidentiality of student communications that do not apply to public health personnel brought into schools. Define the terms as they best describe the school district services, some provide academic/career counseling, others offer personal and social counseling. Use one or more of the following more specific codes as is appropriate:

JLDA   School Counselors and Psychologists

JLDAA   Confidentiality of Student Communications

JLDAB   Referral of Students to other Agencies

JLDAC   Screening/Testing of Students

Use for a policy on the school system's program of psychological services for students. Include assessments or screening methods used for the early identification of problems.

JLDB   At-Risk Student Behaviors

Use to identify any behaviors or profiles that indicate the student's probable academic failure or conduct problems. Various approaches to early identification and intervention are used to promote student welfare and increase the chance of academic success. This policy should express the Board's philosophy toward the program and its commitment to finding effective solutions.

JLDBA   Identification, Interventions, and Postvention Procedures for Student Problems

JLDBB   Self-Esteem Promotion/Suicide Prevention

JLDBC   Substance Abuse Counseling

JLDBD   Child Abuse/Neglect Counseling

Include all forms of child abuse — sexual, emotional, and physical. But detail reporting requirements in a separate policy, Reporting Child Abuse/Child Protection/JLF.

JLDBE   Peer Counseling

Use for information on a counseling program that trains qualified students to provide assistance and serve as role models for at-risk peers or their younger counterparts. Include program evaluation methods.

JLDBF   Mentor Teacher/Caring Adult Program

Use to describe programs where qualified and trained staff serve as role models/caring adults to students identified as at-risk of school failure. Include program evaluation methods.

JLDC   Career/Postsecondary Education Counseling

JLE   Student Social Services

Use for statements on district-sponsored social services and the coordination of these services with those of other agencies. Personnel policies pertaining to school social workers belong in the personnel section. Closely related codes are Relations with Social Service Agencies/KLC and Relations with Welfare Authorities/KLE.

JLEA   Home Visits

Use for a policy on conferences between teachers or guidance counselors and parents.

JLF   Reporting Child Abuse/Child Protection

Use to remind school employees of their legal responsibilities to report all suspected incidents of child abuse, the penalties for failure to report, and their immunity from harassment lawsuits should the case prove unfounded. Incorporate relevant portions of state and federal law. Include means to communicate the policy to school staff.

JLG   Homeless Students

Describe special counseling programs or other services provided to students with no permanent residence within the district.

JLH   Missing Students

Describe district efforts to locate students reported missing; collaboration with local agencies; and programs designed to help "found" students successfully re-enter school.

JLI   Student Safety

Use this set of policies to detail the elements of providing a safe school environment for students. Express the Board's commitment to this goal and ways that student safety issues are identified and evaluated.

JLIA   Supervision of Students

Use to remind school staff that they act as surrogates for parents during the school day and have legal responsibility for proper supervision from the moment the student enters the morning bus to when they depart the bus in the afternoon. Include provisions for before- and after-school supervision as well as playground and other outdoor activity. Although the use of teacher aides may be sanctioned as one aspect of supervision, fully describe their responsibilities under Teacher Aides/IJMA.

JLIB   Student Dismissal Precautions

Refer both to safeguarding the release of individual students to an adult during the day and to assuring their safety at the end of the school day.

JLIC   Safety Patrols (Also EEAED)

Use to describe the use of adult or student safety patrols to protect students from bus and car traffic before and after school. Specify their responsibilities as well as necessary training and supervision.

JLID   Student Bicycle Use

Use for regulations governing students who wish to ride bicycles to school. Include where the bicycles are parked and how they are secured, if this practice is allowed. Also note safety rules vis a vis other traffic and use of the streets, sidewalks, and grounds.

JLIE   Student Automobile Use and Parking

Use for regulations governing students who wish to drive cars to school. Policy should express this action as a privilege and give clear criteria approval of student permits. Note parking areas, safety rules, the transportation of other students, etc.

JM   Student Awards, Honors, and Scholarships

Use for a policy concerning awards and scholarships derived from district controlled endowment funds or provided by other sources through arrangements made with school authorities. Do not use this code in place of Contests for Students/JJG or Student Aid Programs/JLB.

JN   Student Volunteers for School and Community Service

Use for a policy allowing students service as volunteer aides and workers for the school and in the community (when such programs are sponsored by the school or student volunteers are arranged for by the school). Include curriculum reinforcement or other aspects of the educational program connected with this activity. Academic credits for program completion and any eligibility criteria should be described.

JO   Employment of Students

Use for statements on the employment of students by the school system; special help that is given students in finding part-time jobs, special consideration given students who are working; and placement services available to students nearing graduation. Funded work-study programs may be included here (when they are for the purpose of helping students stay in school). Policies on work experience opportunities tied to curriculum, including cooperative education, are filed under Instruction, Vocational-Technology Education/IHAI or Career/Transition-to-Work Education/IHAQ.

JP   Student Donations and Gifts

Use for statements on gift exchanges among students at holiday parties; the giving of gifts to staff members by students and student organizations; and solicitation of students for charity and other appeals. The content of a policy in this category often will overlap with policies on Staff Gifts and Solicitations/GBEBC; Student Fund-Raising Activities/JJE, and Solicitations in the Schools/KH.

JQ   Student Fees, Fines, and Charges

Use for guidelines establishing conditions under which students will pay fees or be charged for materials and services. However, use Tuition Charges for nonresident student fees. Summer school, adult education, and other special program charges are better located under the specific program policy. For fees charged for student activities and by student organization, use Student Activities Fees/JJD.

JQA   Collection of Money from Students

Assign responsibility and describe the procedures for the collection of fees and fines from students throughout the year. Special mention should be made of end-of-year fines since this can produce large sums of cash.

JR   Student Information

Use as a general policy to define various categories of student information, including records, lists of names, and videotapes or photographs. Some of these areas are affected by state and federal laws and should be handled as a stand alone policy in most cases.

JRA   Student Records

Use for a policy that clarifies the purpose for which information is gathered about students and which establishes procedures for the collection, verification, use, dissemination, and ultimate disposition of such information.

JRB   Student Lists

Use for the Board's direction on who should have access to the names of students and their families. Such directory information should be carefully safeguarded from commercial or special interest exploitation.

JRC   Release of Information on Students

Federal law provides a complex set of regulations. Consult your school attorney during policy development and provide for measures to communicate this information to parents.

JRD   Student Photographs

Use for information on the taking of photographs both as a commercial venture and by the media or other parties. Include photos used for student identification cards and yearbooks or other school publications.

K — School-Community-Home Relations

Section K contains statements on relations with the general public, community organizations, public agencies, and families. Policies on relations with other educational agencies and groups are located in Section L. Section K includes policies on the school systems parent involvement efforts; the public information and crisis management programs; community use of school facilities; advertising and solicitations in schools; and the expression of concerns and resolutions of complaints by the public. Two special sequence of codes are available for recoding operational relationships with various community organizations and governmental agencies. Because school, community, and home relations overlap extensively with other major areas of school operations, there are more than the usual number of policies whose content will be included in other section of a policy manual.

KA   School-Community-Home Relations Goals/Priority Objectives

KAA   Evaluation of School-Community-Home Relations

Use to describe the process for evaluating the success of the Board policies in this area. Include ways to involve the public in the evaluation of these programs.

KB   Parent Involvement in Education

Use for policies on programs promoting parental involvement in their child's education or local school matters as they affect the education of their child. Do not use in place of Community Involvement in Education/KC, which refers to the policy process. Use the general policy to set goals and expectations as well as outlining basic strategies for implementation. A policy giving parents specific rights and responsibilities also is filed here. Use one or more of the following specific policies:

KBA   School-Parent Relations Goals

KBB   Parent Rights and Responsibilities

KBBA   Custodial and Noncustodial Parent Rights and Responsibilities

Specify the parental rights and responsibilities guaranteed by state and federal law — regardless of the couple's marital status — as they relate to the education of their child. School districts have found this often times is beneficial to the child although it can create more administrative concerns because of duplicate sending of report cards, etc. Require that a copy of the most recent court decree giving custody rights be filed in the school office. In situations where a divisive separation occurs, urge administrators to place the welfare of the child first. Assign responsibility for making decisions on who may or may not see the child at school, etc., to a specific staff person at each school.

KBBB   Surrogate Parent Rights and Responsibilities

Use to describe cases where a substitute parent is appointed by the court or another official agency to act as a guardian for the student. The situation might be temporary or permanent. Specify which parental rights and responsibilities are applicable in this instance.

KBC   Parent Involvement in Decision Making

Clarify the role parents have in making school-level decisions about curriculum, activities, scheduling, etc. This is particularly relevant in school- or site-based management reforms. Councils, committees or direct involvement are among the possible implementation strategies.

KBE   Relations with Parent Organizations

Use to set forth special relationships that exist between parent/
parent-teacher groups and the schools/school system. May
include special considerations given such groups for use of
school facilities, distribution of notices, assistance with organiza-
tion. May include statements on cooperative school-parent
group fund raising. If a parent organization serves as an official
advisory body to a school or school system, a policy on that
topic should be coded under Advisory Committees/BDF and
cross referenced.

KC   Community Involvement in Education

Express the Board's conviction that since schools belong to the
community the community must be involved in education for that
mission to succeed. Education in this sense, as distinct from
parental involvement in education, refers to all aspects of
education from the individual student progress to long-range
planning.

KCA   School Community Relations Goals

KCB   Community Involvement in Decision Making

Use for a general policy summarizing ways the Board involves
citizens as it makes major decisions. Do not use in place of the
more specific descriptors Advisory Committees/BDF or Public
Participation at School Board Meetings/BEDH.

**KCBA   Measuring Community Attitudes/Surveys/
          Questionnaires and Survey Research**

Use to authorize surveys and other forms of research designed
to elicit an accurate representation of community views. Include
focus groups under this heading. Explain the purpose of the
research and the results will be analyzed and communicated to
school officials and to the public.

KCBB   Use of Polling and Survey Research

Describe how the polls and other research will be incorporated
into the school decision making process. Annual questionnaires,
for example, might precede the budget preparation and
goal-setting stage of the school cycle.

KCC   Community Involvement in School Elections

Emphasize the importance of community involvement in school
bond campaigns to authorize long-term debt. Describe the
campaign organization, if that system relies on citizen leader-
ship and effort. Discuss ways to recruit campaign leaders and
workers.

KCCB   Community Involvement in Budget Referenda

Emphasize the importance of community involvement in school
budget referenda campaigns to approve the annual school
budget or a tax/levy increase. Describe the campaign organiza-
tion in detail if that system relies on citizen leadership and effort.
Discuss ways to recruit campaign leaders and workers.

KCD   Public Gifts/Donations to Schools

Use for a policy on gifts offered to the school system or to
individual schools by individuals or groups, including controls
and restrictions. May include statement on equivalency among
schools in relations to gifts. Clarify the approval review process
and that an accepted gift becomes the property of the district.

KD   Public Information and Communications

Use this set of policies on the importance of frequent, quality,
and accurate school system communication with the public and
various school constituencies. Include methods to evaluate the
information and communications program.

**KDA   Public Information/School Communications
          Program**

Describe the district's formal public relations and communica-
tions programs. Express the program philosophy and locate

responsibility for its administration. Identify various components of the
public relations effort such as Board minutes, school publications,
cable TV, etc. One or more specific policies should provide necessary
guidelines in the following areas:

KDB   Public's Right to Know/Freedom of Information

This area is affected by state and federal law so consult your school
attorney during policy development. In general it covers the types of
information and documents that the public has access to — most
types of materials except for student records and personnel records.
Meetings are included under some provisions. Timelines to comply
with records requests and exceptions to the public access rule should
be noted relevant portions of the statutes included.

KDC   School-Sponsored Information Media

List and state goals for each information medium that is district
initiated and controlled. Do not use in place of Student Publications/
JICE or Handbooks and Directives/CHCA.

KDCA   Use of Students in Public Information Program

Set forth guidelines and the approvals and clearances from students
or others that must be obtained before a picture can be printed in a
school-sponsored publication.

KDD   Media Relations

Use to describe the district's ongoing media plan and contacts with
local, regional, and state media as well as a strategy to work towards
having the most effective, accurate, and balanced image of schools.

KDDA   Press Releases, Conferences, and Interviews

KDDB   Sports and Special Events Media Coverage

KDE   Crisis Management/Communications

Use for information on the school information program during an
emergency. State program goals and locate specific responsibility for
being a spokesperson during the crisis. Give examples and possible
action plans.

KE   Public Concerns and Complaints

Use this sequence of policies on how the public may register and
seek responses to their questions, concerns, and complaints about
various aspects of schools. Use the general policy to state the
Board's general point of view on the subject; use specific policies to
give guidelines on the best communications vehicle for each topic.
Many policies reiterate the principle of resolving concerns at the point
at which they concern and working up the ranks through the
administration to the school Board for final review. Describe the types
of concerns and complaints that members or groups of the public
might have. Establish effective two-way channels of dialogue. Include
any exhibits of concern forms. Also give grievants the opportunity to
raise their concerns during a Board meeting, although policies on this
should be filed under Public Participation at Board Meetings/BEDE.
The following specific policies detailing types of complaints may be
used.

KEA   Public Concerns/Complaints about Policies

KEB   Public Concerns/Complaints about Personnel

**KEC   Public Concerns/Complaints about Instructional
          Resources**

**KED   Public Concerns/Complaints about Facilities and
          Services**

KF   Community Use of School Facilities

Use this set of policies for guidelines on who and under what
circumstances the schools may be used by other groups. Policies
often emphasize the priority of the educational program but encour-
age their community use in other cases. Policies and regulations in
these areas are extremely specific with different fee schedules and
definitions of users. Fee schedules are treated as exhibits. Risk
management concerns and other forms of acceptable conduct by the
public are included. Special policy codes can be added as needed

concerning the use of special facilities such as swimming pools and stadiums.

KFA   **Public Conduct on School Property**

KFB   **Community Use of School Buildings**

KFC   **Community Use of School Fields and Grounds**

KG   **Business and Industry Involvement in Education**

Use for policies promoting school partnerships with business organizations and other commercial interests. All forms of activities of mutual interest should be included. Do not include policies on advertising, which should be filed under Advertising in Schools/ KHB. Cooperative agreements should be included as exhibits; communication vehicles should be developed in policies. Use one or more of the following policies:

KGA   **School Foundations**

Use to set up arrangements encouraging financial and other forms of support to schools. Often special administrative arrangements are needed.

KGB   **Adopt-A-School Programs**

Use for encouraging businesses and other types of organizations to provide resources or services to a particular school.

KGC   **Cooperative Programming with Business and Industry**

Use for policies on ways that business and industry and review and contribute to curriculum development in subjects relating to their expertise. Provisions for staff visitations as well as special types of committees are included.

KGD   **Business and Industry Donations/Joint Ventures with Schools**

Use for information on a variety of mutually beneficial activities undertaken by both groups. Because of their commercial nature, file business donations in this category instead of in Public Gifts/ Donations to Schools/KCD.

KH   **Solicitations in Schools**

Use for a policy on charity and other fund-raising efforts sponsored by community or commercial groups that are conducted in the schools. Include the Board's stance on what forms of advertising or other promotional materials are allowed and any relevant policy distinctions that depend on the group sponsoring the material or conducting the campaign. The variety of policy topics covered in this category usually makes separate policies expedient.

KHA   **Public Solicitations in Schools**

Use for a policy governing community and other civic groups.

KHB   **Advertising in Schools**

Use for a policy on forms of commercial advertising whether or not they are attached to a donation of goods or services. This policy might cover billboards at athletic fields, goodwill advertising in the yearbooks, etc.

KHC   **Distribution/Posting of Promotional Materials**

KHD   **Business Solicitations in Schools**

Use for a policy on what forms of commercial ventures are promoted in schools. Specify the review and approval process and locate responsibility both at the school and the administrative levels. This policy might cover student or family photographs and book club flyers, etc. But do not use this code in place of Special Interest Instructional Materials Selection and Adoption/IJL or Sales Calls and Demonstrations/DJGA.

KHE   **Political Solicitations in Schools**

Use for a policy on what if any types of campaign related or other forms of appeals by political officials, groups, or organizations are allowed.

KI   **Visitors to Schools**

Use for a policy that welcomes visits to schools for legitimate purposes and establishes safeguards concerning school visitors. Individual Board member visits to school may be included. However, do not use in place of Sales Calls and Demonstrations/ DJGA, Public Conduct on School Property/KFA, or Professional Visitors and Observers/LI.

KIA   **Identification Procedures**

Use to describe sign in procedures, visitor badges, or monitoring devices that help ensure the safety of students and staff from unauthorized intruders.

KJ   **Relations with Community Organizations**

Use this set of policies as needed for statements setting forth relationships (including operational relationships) between the school system and various community organizations. Use the general policy to express the Board's general point of view on the subject. Use specific policies for statements dealing with any special relationships the school system may have with specific groups. Add other codes as needed.

KJA   **Relations with Booster Organizations**

KJB   **Relations with Neighborhood/Community Associations**

KJC   **Relations with Churches**

A general policy may express the Board's recognition of the principles of religious freedom and separation of church and state. More specific topics may be covered or mentioned: a "church" night when schools ordinarily will not schedule events; restrictions against recruiting by religious organizations on school property; special policies pertaining to the sue of school facilities for church services; a definition of "religious organizations" that may relate to the interpretation of various policies. Cross references may be needed to and from this category. Note that relations with parochial schools are covered under Private/Parochial Schools/ LBC.

KJD   **Relations with Youth Organizations**

KJE   **Relations with Community/Private Social Service Organizations**

KJF   **Relations with Labor Organizations**

KJG   **Relations with Indian Tribal Councils**

KJH   **Relations with Child Care Providers**

KJI   **Relations with Senior Citizens**

KK   **Relations with Professional Associations**

Use for a policy describing the relationship with professional associations. Include all types of educational groups or special interest activities that are professional in nature.

KL   **Relations with Government Authorities**

Use as needed to describe forms of regular communication and exchanges with local, regional, state, and national government authorities. Use the KL series to describe specific forms of assistance or resources provided; use the KM/KN/KO codes for the Board's general approach to relationships with each level of government.

KLA   Relations with Financial/Tax Authorities

KLB   Relations with Election Authorities

KLC   Relations with Social Service Agencies

KLD   Relations with Housing Agencies

KLE   Relations with Health and Welfare Agencies

KLF   Relations with Parks and Recreation Agencies

KLG   Relations with Law Enforcement Authorities

Use for a policy on school-police cooperation and on school-police educational programs. May include listing of instances in which school authorities will call police. Include a description of police personnel regularly assigned to schools. However, use Interrogations and Searches/JIH for questioning, search, and arrest of students while at school or under school control.

KLH   Relations with Fire and Emergency Preparedness Authorities

KLI   Relations with Environmental Protection Agencies

If environmental impact plans are required, include that information in Construction Plans and Specifications/FED. Include the various reports and other types of environmental data that must be submitted under federal and state programs under Environmental and Safety Program/EB.

KLJ   Relations with Planning and Zoning Authorities

KLK   Relations with Local Government Authorities

Use to set forth specific relationships with the chief governing body — a city council, Board of selectmen, etc. Amend the terms as desired to correspond with the official titles of your local Boards and commissions and add other codes as needed.

KLKA   Relations with Municipal Authorities

KLKB   Relations with County/Regional Authorities

KLL   Relations with State Government Authorities

KLM   Relations with Federal Government Authorities

KLMA   Relations with Military Agencies/Armed Forces

KM   Relations with Cultural Institutions

Use for describing the goals and resources available at local, regional, or state cultural institutions, such as libraries, museums, planetariums and the like. Specify the Board's commitment to forming relationships that will benefit the cultural and curriculum enrichment of students whenever possible.

L — EDUCATION AGENCY RELATIONS

Section L contains statements that concern the school system's relationships with other education agencies and organizations — other school systems, regional or service districts, private schools, colleges and universities, educational research organizations, and state and national education agencies.

LA   Education Agency Relations Goals/Priority Objectives

LB   Relations with other Schools and School Systems

Use the general policy for statements on the Board's position in respect to interdistrict services and cooperative education programs. One or more of the following policies can be used to describe specific types of arrangements or forms of cooperation:

LBA   Shared Services and Staff

Use to describe arrangements where districts share personnel resources, no matter whether the staff involved is instructional, administrative, or classified. Detail salary and other forms of administrative concerns. Include services such as data processing, transportation, programs operated by one district that another district may share in on a fee basis.

LBB   Cooperative Educational Programming

Use to describe programs where districts offer joint classes or staff inservice either in person or via a technology medium. Include special education or vocational education. Relations with intermediate districts to provide such instruction may be included.

LBC   Relations with Nonpublic Schools

Use this code for a general statement and for statements that relate to specific arrangements — for example, providing textbooks, transportation, auxiliary services to nonpublic school pupils, as the law permits. Policies pertaining to the acceptance of credits from nonpublic schools should be filed under Admission Procedures/JFA.

LC   Relations with Education Research Agencies

Use for statements concerning school system cooperation with outside organizations conducting research and for control on such projects conducted by the outside organization in district schools. Do not use this code in place of Curriculum Research/IGB or Professional Research and Publishing/GCS.

LD   Relations with Colleges and Universities

Use to describe the forms of interaction and resources shared with local, regional, and state colleges and universities. Include surveys and other forms of research conducted by these groups in schools under Relations with Education Research Agencies/LC. Use one or more of the specific policies as appropriate:

LDA   Student Teaching and Internships

LDB   Cooperative Programming with Higher Education

LDC   Staff Development Assistance from Higher Education

LE   Relations with County/Regional Education Agencies

Use for a policy concerning the relationship involving the school system and the county education agency. This policy also might clarify areas of authority.

LF   Relations with State Education Agencies

Use for a statement clarifying relationships and expressing any position of the Board on matters of mutual concern. Do not use this code in place of School Board Legislative Program/BJ or Revenues from State Tax Sources/DEB.

LG   Relations with Federal Education Agencies

Use for a statement clarifying the relationships and expressing any position of the Board on areas of mutual concern. Do not use this code in place of Funding Proposals/DD, Revenues from Federal Tax Sources/DEC, or School Board Legislative Program/BJ.

LH   Relations with Education Accreditation Agencies

Use for a policy and/or information on the accrediting agency for the district schools and on the manner in which the schools are accredited.

LI   Professional Visitors and Observers

Use for a policy pertaining to visits by out-of-town educators and Board members to observe exemplary program, new facilities, or for evaluation purposes. Do not use in place of Visitors to the Schools/KI.