

## NCSBA CUSTOM POLICY SERVICE

### OVERVIEW

NCSBA has contracted with the Transylvania County Board of Education to provide a full policy service customization service in order to assist board with reviewing, revising, and updating its existing policy manual.

NCSBA will provide the school system with a complete set of draft policies for the board to use in its policy manual review and revision process. The draft policies provided to the school system will include updated versions of all legally mandated policies as well as other policies essential to the operation of a North Carolina school system. When customizing a local board's policy manual, NCSBA uses its sample, recommended Policies to Lead the Schools (PLS) manual as the base manual. We then "customize" these policies by incorporating specific local provisions from your current policies and making further revisions at the request of the board and policy committee. A full customization typically takes up to two years to complete. Our service minimizes the amount of time that your school system staff will need to devote to this full revision and update project.

The cost of the custom policy service includes online access to our PLS manual as well as PLS updates (usually two or three per year) for the duration of the customization process.

### PROCESS

#### 1. Preliminary Correlation Tables

To determine which of your existing policies correspond with PLS policies, we create two preliminary correlation tables. The first table ("Preliminary Reverse Correlation Table") lists all the policies in your current manual and indicates which PLS policies correspond to which of your current policies. The second table ("Preliminary Correlation Table") does the opposite. It lists all the numbers and names of policies in PLS and identifies which policies in your current manual correspond to PLS policies. As a result, you can always determine where your prior policy is addressed in PLS. As the process goes on, these documents will be revised accordingly, and at the completion of the customization project, we will provide final correlation tables.

#### 2. Draft Policies

We create the initial draft policies by incorporating the information from your current policy into our standard PLS policy on the same topic. We will generally send an entire "series" of policies on a particular category (e.g., students, personnel, board operations) to your policy contact person; this can be anywhere from 20-40 policies at a time. We will proceed in chronological order through the manual, unless directed otherwise. NCSBA provides the school system (in an attached zip folder via email) with a draft of each policy in a "track change" format that uses strikeout and underline text formatting to show any changes. This allows board members and staff to see what language has been

added to or removed from the standard policy based on your system's existing policy(ies). Along with the draft policies, we will send a chart that provides explanatory comments, questions, or suggestions to consider with each policy. For instance, such comments may explain whether certain provisions are legally required or optional and/or whether provisions in your current policy are obsolete or legally questionable.

### 3. Review by Staff/Policy Committee

Upon receiving the draft policies, your school system will need to determine the best way to review the policies. Many systems use a policy committee and/or identify appropriate staff members to review each draft section before it goes to the full board for review. For example, you would likely want your personnel director to review the 7000 series on personnel and your finance officer to review the 8000 series on fiscal management.

Note, PLS contains several policies that are codified in more than one section to help users find these policies more easily. For example, our policy 4040/7310 on staff-student relations is double-coded to the student section (4000) and to the personnel section (7000). Thus, you may want to have these dual-coded policies reviewed by several groups, as appropriate.

### 4. Making Changes to Draft Policies

Once the school system staff and/or others review the draft policies, the policy contact person must notify NCSBA of any proposed changes. One person should be designated to compile all changes proposed by your policy reviewers and then to communicate those proposed changes to us. If questions arise about any of the draft policies, the contact person should call or email the NCSBA staff attorney assigned to your project.

### 5. Policies for First Reading

NCSBA will attempt to answer any questions and review any proposed policy changes before incorporating such changes into the draft policies. We will then send the policies back to the school system with track changes formatting for the board's "first read."

### 6. Policies for Second Reading and Approval

After the first reading, the school system's policy contact person should inform NCSBA of any further questions or suggested revisions based on the board's review. If no changes are needed, we will remove the track changes formatting from the initial draft and send a set of "clean" policies for board approval.

### 7. Adopted Policies

After the board has voted to approve any policy or set of policies, the school system policy contact person should email NCSBA a list of policies that were adopted along with

each policy's adoption date. We will then create a final copy of each policy with the adoption date listed to keep on file and to post on your school system website.

#### 8. Updates and Final Clean-up

Of course, legal requirements tend to change over time and may even change during the course of your customization project. While your customization project is underway, we will provide you with updates to your new policies. As a final step in the process, we will review your entire manual to ensure that your policies are up-to-date as of the date we complete your project.

#### 9. Transition from the Old Manual

We understand that during the transition from your current policy manual to a new manual with a new numbering system, there may be confusion as to what policies are in effect at any given time. We are prepared to help you manage this transition by posting notices on your website and otherwise explaining the transition to your staff and community. Also, at the final stage of the process, the board should officially rescind all of the policies from its former policy manual to make sure nothing that remains will create any confusion in the future.

#### 10. Final Copy of Manual

Once the new manual is finalized, NCSBA will provide the school system with an electronic copy of its newly adopted policy manual.

#### 11. Regulations

Under this service, NCSBA provides guidance on board policies only. We do not write or review a school system's regulations as a part of the policy customization process except when necessary to clarify the language in a particular policy. As the board adopts new policies, the administrative team will need to review existing regulations/procedures and revise them as necessary to ensure that they are consistent with the new policies. In addition, because many of our base policies call for the superintendent to develop regulations to implement the policies, the administrative team may need to create regulations in some new areas.