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AUTHOR  Dickinson, William E.


INSTITUTION  National School Boards Association, Evanston, Ill.


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ABSTRACT  Written policy by local school boards is essential for efficient operation of the total educational program. At least one-half of the nation's 20,000 school boards have not established a written policy statement or kept one updated with new methods. This research established a taxonomy of terms that should be included in such a statement along with exhibit documents that illustrate the taxonomy. The 12 terms are school district organization, school board operations, business management, facility expansion program, students, general public relations, fiscal management, general school administration, personnel, negotiations, instructional program, interorganizational relations, and relations with other education agencies. Recommendations include: (1) developing workshops for school board members and school administrators in policy development, (2) developing an information clearinghouse in policy development, and (3) adapting this research to community college governing boards. (LN)
FINAL REPORT

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DEVELOPMENT OF A SCHOOL BOARD POLICY CODIFICATION SYSTEM AND
SCHOOL BOARD POLICY INFORMATION CLEARINGHOUSE

William E. Dickinson
National School Boards Association
1233 Central Street
Evanston, Illinois 60201

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In addition, Eugene Wall, president of Lex-Inc., Rockville, Md., served as the Project's information systems consultant and Carl G. Nelson, Old Lyme, Conn., served as project assistant.

Finally, Harold V. Webb, NSBA executive director, provided continued guidance and supervision in his role as project director.

Each of these individuals contributed much to the work of the Project; their valuable contributions are deeply appreciated.

--W.E.D.
SUMMARY

Written policies have always been the sine qua non of a soundly organized and efficiently operated school board, and the need for an effective system for keeping policies up-to-date has been accentuated by the many changes and developments brought about in the decade of the 1960s.

Yet, as the decade drew to a close, the National School Boards Association (NSBA) had acquired considerable evidence that the nation's school boards had great need for assistance in making written policies a viable part of their operations. An NSBA survey indicated, for example, that perhaps as many as half of the nation's 20,000 school boards either maintained no manual of written policies or they were employing inadequate methods of recording policy decisions--and thus allowing their policies to become out-of-date.

The research reported herein was carried out in response to this need. Specifically, this activity achieved the following objectives:

--It created a taxonomy for the classification and codification of policy statements, companion administrative rules statements, and other resource documents important in the policy-development process.

--It created an array of exhibit documents to illustrate the taxonomy.

--It created the model for a school board policy reference manual, which includes the classification system; index of terms; and the exhibit documents.

--It created the model for a handbook to provide orientation and instruction for local school officials using the system.

--It created the model for a policy information clearinghouse designed to serve as a national repository of school board policy manuals and as an "information exchange."

--It created the model for a monthly publication designed to help school board members and professional educators keep abreast of change in policy development theory and practices.

No unusual or new methods were employed in this research. A total of 10,000 candidate terms were collected for the classification system, and 1,000 edited and coded terms
were preserved for use. More than 300 school board policy manuals and related pieces of literature were collected for use in searching out exhibit documents, and a total of 202 edited and coded discrete exhibit statements were preserved for use. School board members, school administrators, a school attorney, and staff members of state school boards associations and state education agencies monitored and advised on various phases of the research activity.

The various products of the research activity were designed as a comprehensive program for encouraging the orderly development of school board policies to meet the needs of changing times. In its totality, the program attempts to provide a means whereby local school boards might continuously evaluate the quality of existing policy utterances and identify areas of need for new and/or modified policy statements. It also attempts to establish a clear channel for the exchange of information regarding educational policies among local, state, and federal education agencies in the United States.

Convinced that such a program of assistance is urgently needed by a society in turmoil, the National School Boards Association assigned the highest priority to this research effort with the object of publishing the various models in January, 1970, as part of a new NSBA Educational Policies Service. This Service was inaugurated on schedule.

The dissemination of information about both the research and Service phases of these activities has been widespread; the demand for assistance from local school districts is stronger than previously anticipated. The National School Boards Association--in cooperation with its state affiliates--is making the strongest possible effort to meet this demand within the limits of its present resources. Nevertheless, the research results point unerringly to the next steps which must be taken if the fruits of these labors are to meet their full potential. That potential is nothing less than improving the quality of local school governance throughout these United States.

There is still need for a program of workshops and similar inservice education experiences designed to develop expertise among school board members and school administrators in policy development practices.

There is need to link up the strong information gathering and dissemination facilities of the NSBA policy information clearinghouse with other educational information centers.

And there is need to adapt the results of this research to the particular needs of the growing number of community college governing boards.
CHAPTER 1

Introduction: School Board Policies and the Crisis in Local School Governance

In the 1960s, the troubles that afflicted American life and society deepened and—as a consequence—infected the lifeblood of the nation's system of public education. The drug problem. Crippling teacher strikes. Vandalism. Violence in school corridors. Racial isolation. Inequalities of educational opportunity. Outdated programs and methods. These were but a few of the syndromes of the illness in our schools.

When troubles deepen, it is tempting to retreat into pessimism. But it is infinitely more constructive to hold on to hope for the promises of public education, and to plan and work for the kind of schools in the kind of society that enrich the lives of our people.

It is well, too, to stand back for a moment from our present troubles and to acknowledge what we as a people have accomplished in the unique experiment called public education.

"Perhaps the best measure and most striking summary of the basic thrust of American public education is the fact that at the turn of the century only about 4 percent of the eligible age group graduated from high school, while today almost 40 percent of our young people enter college. Thus in terms of mass education, the enterprise has been a huge success and is still unique among major nations.

"Moreover, the emphasis on mass—through universality, regardless of social and economic background—is more than a matter of quantity; it is crucial to the political idea of equal opportunity, based in the main on Thomas Jefferson's belief that ignorance and freedom could not exist side by side in a democracy."

Implicit in the research reported herein is an acknowledgement of the many and complex problems our schools face combined with a faith that the educational leadership community

has the capability to forge a finer future for our nation's children, youth, and adults.

The Importance of School Boards

American school boards are the responsible governing bodies of the nation's public schools. The National School Boards Association (NSBA), through its affiliated state associations, represents school board members responsible for 95% of all public elementary and secondary students in the United States.

About 100,000 Americans serve on school boards--for the most part, without pay and as a public service. They come from every walk of life--doctors, dentists, lawyers, laborers, merchants, managers, carpenters, housewives, farmers, professors. School board members are the connecting link between the public, which supports our schools, and the professional educators, who administer them. While public education in the United States is a function of the states, and while the ongoing work and support of the public schools are, in fact, carried on under a unique local-state-federal "partnership", the major responsibilities of public school governance have been delegated to local school boards.

"The American system of universal education is unique in world history and is a distinguishing characteristic of our society. Dedicated to the principles of equality of opportunity and democracy, this system safeguards the freedom and unity of our people and is one of the best guarantees of their social and economic well-being....Within the limitations of the federal Constitution, states have full power over their educational affairs, and for meeting their educational needs....Each state is responsible for allocating to its state and local educational agencies the functions to be performed by them. Political subdivisions of the states [are] established solely for educational purposes, [and are] usually governed under delegated powers by locally selected boards of education....

2. The National School Boards Association, a federation of 50 state school boards associations, is a nonprofit organization incorporated under the laws of Illinois. One of the organization's purposes, as stated in its Constitution and By-laws, is "to work for the most efficient organization of the public schools."
"Most teaching takes place at the level of the local educational agency. With such assistance as may be available from other agencies, each local educational agency should assume responsibility for the teaching it performs. This agency should have primary control of the educational program in all its operational aspects, and should exercise broad discretion concerning who shall teach and what shall be taught, within the legal framework of state requirements. It should look primarily to the state for services and financial assistance, including guidelines for intergovernmentally financed programs involving the state and federal governments. Each local educational agency should assume full responsibility for meeting the requirements attached to intergovernmental funds concerning educational purposes for which such funds may be used, for diligent and effective planning and operation, and for suitable accounting for program results and funds. Within these general requirements, the agency should retain sole control of local teaching, utilizing all possible resources to assist in the advancement of education."3

Obviously, the powers that reside in the local school board are great, and it is not with exaggeration that one might say, as the school board, so are its schools. "[School boards'] powers and position in the structures of education make them key agencies in school improvement programs," writes Alpheus L. White. "A soundly organized and efficiently operated board of education is essential to the provision of good schools."4

The Importance of a Written Policy System

Written and continuously updated policies are the sine qua non of a soundly organized and efficiently operated school


board. As White points out in his summary of literature in the field, "policies contribute to effectiveness by: (1) fostering continuity, stability, and consistency of board action; (2) enabling the board to provide for many affairs or conditions in advance of their happening; (3) saving time and effort by eliminating the necessity of having to make a decision each time a recurring situation develops; (4) facilitating the orderly review of board practices; (5) aiding boards in appraising educational services; (6) improving board-superintendent relationships; (7) reducing pressures of special interest groups; (9) enabling staff members to understand their work in relation to the total activities of the school system; (10) facilitating the improvement of staff morale by providing uniform and fair treatment; (11) keeping the public and school staff informed of board action; and (12) giving lay citizens a better understanding of how they can work with school authorities in building a good school system."

Recognizing the importance of written policies to efficient public school operations, NSBA in the period between 1958 and 1960 produced in cooperation with the National Education Association, the Reference Manual on Written School Board Policies and a companion publication, How to Develop Written Policies: A Guide to Procedures. The purposes of this bellwether service were as follows:

1. To convince school boards that written policies are important
2. To define essential terms (policies, rules, regulations, bylaws)
3. To present a suggested outline of content for a school board policy manual
4. To present illustrations of written policies related to the outline of contents.

The looseleaf Manual exhibited hundreds of actual examples of written policies gathered from schools across the nation and arranged under the following headings: educational philosophy, school organization, boards of education, administration, business and operation, certificated personnel, non-certificated personnel, students, instruction, and school-community relations. The Manual went through three printings in the early 1960s and upwards of 3,000 copies were

5. Ibid, pages 63-4.
distributed to local school boards, other educational agencies, and to the headquarters of affiliated state school boards associations.

Also in the 1958-60 period what is believed to be the first commercially-produced school board policymaking system made its appearance. In more recent years several private publishers and several of NSBA's own state affiliates have produced policy reference documents and services.

In addition, the NSBA and all its affiliated state school boards associations, in cooperation with colleges, universities, state education agencies, and various professional education societies, have conducted over the past decade innumerable conferences, workshops, and clinics on the importance of written school board policies and on procedures for developing them.

In short, the NSBA and other organizations have been aware of the problem of creating policy-minded school boards and have worked in various ways to solve the problem. And the total impact of the above mentioned forces has undoubtedly been favorable to a degree. "One of the most significant and highly successful means of improving the overall efficiency of local school district operation," says White, "has been the development of comprehensive board policy manuals."

The Need for Assistance

With all this activity, did local boards of education of the 1960s still need assistance with the task of getting policies into writing and keeping them up-to-date?

The National School Boards Association had abundant evidence that they did. In fact, the need for sophisticated, comprehensive, and continuous help was perhaps greater than ever before in the history of American education.

The need stemmed from three phenomena: (1) the policy-writing lag; (2) obstacles to the policy-writing process; and (3) the pressures caused by changing times.

6. The Davies-Brickell System of School Board Policymaking and Administration, developed in the schools of Manhasset, N.Y., under a grant from the Kellogg Foundation, has been published by Croft Educational Services of New London, Conn., since 1958.

The L. To the knowledge of the NSBA, the most recent (and perhaps only) "count" of school board policy manuals was White's. Using data collected in 1959, he indicated that 60.4% of the 4,032 school boards responding to the item reported that they had a policy manual.

Having a manual and having a manual that represents an operable system for keeping written policies up-to-date are two quite different things. While many school boards undoubtedly have developed good procedures in this area, many more are using obsolete and inefficient procedures—or have yet to adapt any system at all for rendering policies into writing.

In the spring of 1968, to acquire a sampling of evidence on present practices and needs, NSBA surveyed 50 State Departments of Education (SDEs); the Executive Secretaries of the 50 State School Boards Associations (Exec Secs); and 200 school board-owners of the NSBA-NEA Reference Manual on Written School Board Policies.

The results of the survey clearly indicated a continuing need for assistance. Only 7 out of 24 of the SDEs responding to the item indicated that a majority of local boards maintained a well-developed system for keeping written policies up-to-date. The estimates of Exec Secs were lower; only 3 of 25 respondents to the item reported that a majority of boards in their states were in good shape on this matter.

The need for assistance seemed also to exist even in those states in which written policies are required by state law or SDE regulation. Georgia is one such state. Yet its SDE estimated that 25% of its local boards do not have a well-developed policymaking system. Texas is another. Yet Texas reported 30% of its local boards without such a system. "Some boards," reported the Texas SDE respondent, "do not realize the importance of revising...policies as programs or operations change with the times or community needs. Also, many boards fail to make use of looseleaf policy manuals which can be easily revised and kept current."

Regarding the local school boards surveyed, 54 of the responding 73 reported they had a written manual of their own, and an additional 10 reported they were at work in codifying their policies. Yet of this group, a group that one might suspect had its house in order in the matter of policy-writing, 67 of the 73 expressed interest in the possibility of getting ongoing and more comprehensive assistance from the NSBA.

The Obstacles. The development of any new policymaking
system and/or service must take into account this question: Why, by now, haven't the great majority of local school boards in America developed a viable policy-making system?

NSBA's survey of SDEs and Exec Secs yielded some clues. These were the reported "obstacles" to the school board's duty to get policies in writing and to keep them up-to-date:

1. Lack of staff and/or time
2. Poor administrative leadership
3. Negative board attitudes (Think policies are "restrictive"; regard policies as not important)
4. Lack of know-how
5. Frequent turn-over of board members
6. High cost of consulting help
7. Lack of available resource information

The Alabama SDE reported to us that some boards don't put policies into writing because of "a mistaken desire to avoid being tied to certain courses of action by having adopted definite policies." They think policies would "tie their hands." Similarly, the California SDE reported an attitude "that written policies are 'too confining'...[and that] small districts think they 'don't need policies.'" The Connecticut Exec Sec reported that misunderstanding is often reflected when its requests for local policy samples sometimes bring in documents--like curriculum guides--that are not policies at all!

Regrettably, the lack of understanding sometimes extends to state school officials. One reported with pride that its better school systems reviewed its policies once a year. It's erroneous to believe that policymaking can be a once-a-year project. Effective educational policy decision-making is a process that goes on year-long at meeting after meeting.

. Changing Times. As indicated above, upwards of 3,000 copies of the NSBA-NEA Reference Manual on Written School Board Policies were put into distribution, most of them during the period between 1960 and 1963. But the contribution of the Joint NSBA-NEA Committee in creating this reference document was made obsolete by the end of the decade because of dramatic new developments which related critically to problems of local school governance and policymaking.
Consider:

- The massive infusions of federal aid since 1965, and the consequent impact of federal influence upon educational development.
- New problems relating to board-staff negotiations, and the phenomenon of teacher militancy.
- The urban crisis, problems of de facto segregation, the renewed challenge to provide equal educational opportunity for all, the pressures for a greater degree of "community involvement" in decisionmaking.
- The pressures to break up large districts—and to consolidate small ones. The search for "metropolitan" or regional solutions to educational problems.
- The new body of law and procedures affecting the civil rights of minors, codes of dress, student activism, and the use of drugs.
- The changing nature of church-state relationships.
- The advent of the nonprofessional classroom aide, and new patterns of class organization and scheduling.

It is needless to extend the list. The point is obvious. No reference on school board policies produced almost a decade ago, regardless of its value at the time of development, could have anticipated so many great and continuing changes.

In summary, despite previous and continuing efforts to make local school boards aware of the vital importance of their policymaking responsibilities, there existed in 1968 a critical lag in the practice of developing at the local level a systematic way of getting policies into written form and keeping them up-to-date. And despite existing resources in this field, there was need for new, ongoing, sophisticated assistance to local school boards with the dynamics of policy-writing. It was obvious that any future services to local school boards in this field must be so designed as to be accommodating to change. Until the need for help in this area was met, the efficiency of local school governance would be less than it was capable of becoming; if it was not met, the progress of America's schools could be in jeopardy.
Objectives of the Research Activities

With the above needs in mind, the National School Boards Association on October 4, 1968, requested assistance from the United States Office of Education for a year-long development project which would lead (1) to the development of a practical policy development system suitable to the policymaking functions of local school boards and adaptable to the policymaking functions of other public educational bodies; and (2) to the development of a model for a school board policy information clearinghouse.

The NSBA reasoned that the proposed project would contribute positively to the quality of local public school governance in the United States. The proposed project would establish a comprehensive program for encouraging the orderly development of school board policies to meet the needs of changing times. It would establish a means whereby local school boards might continuously evaluate the quality of present policies and identify areas of need for new or modified policy statements. It would open a clear channel for the exchange of information regarding policy and policy-related matters among local, state, and federal educational bodies in the United States. And it would contribute, ultimately, to a better understanding of the educational policymaking process among lay board members, professional school administrators, school staffs, and the public.

Specifically, the following activities would be required to implement the proposed project:

1. The collection of policy samples. The NSBA would solicit policy manuals from 150 school districts representing every geographic region of the United States. Simultaneously with the collection of policy manuals, the NSBA would solicit permission to reproduce any of these sample policies for any future dissemination as may be deemed desirable.

2. The development of a classification system. The NSBA would develop a standard vocabulary of policy descriptors and an open-ended classification system suitable to the policymaking functions of other public educational bodies.

3. The codification of sample policies. The NSBA would ascribe codes and code titles to a minimum of 150 sample school board policies. The policies would represent every major category of school district operations and also be representative of governing boards of large, medium-sized, and small districts throughout the United States.
4. The production of a prototype policy reference manual and handbook. The NSBA would create an exhibit of the newly developed classification system and demonstrate its practical application through the production of a prototype reference manual (containing the sample policies) and handbook. The primary function of the handbook would be to demonstrate the adaptability of the system to local needs.

5. The establishment of a model for a policy information clearinghouse. The NSBA would develop a system for the effective exchange of school board policies and information about school board policies to, from, and among local school districts; to, from, and among state school boards associations; and to, from, and among other interested public educational agencies and organizations. It was anticipated that the clearinghouse would eventually serve as a national repository for literature in the field and also as a national center for the dissemination of information about policy development theory and practice.

6. The production of a prototype publication designed to disseminate information about school board policymaking in America's public schools. The NSBA would produce the model for a monthly publication which would be both advisory (dealing with the theory and practice of school board policymaking) and bibliographic (listing each month coded policy documents and other resources available from the proposed clearinghouse).

In its proposal, the National School Boards Association indicated that it was "prepared to follow a vigorous course of action and service to its membership and to the educational community-at-large in order to put to their most productive use the fruits of the proposed development activity...[that it was] prepared to produce and distribute through its usual channels upwards of 3,000 copies of the proposed manual and handbook;...[that it was] prepared to assume responsibility for the continuing operation of the proposed clearinghouse and to produce and to seek the widest possible distribution of the proposed clearinghouse publication;...[and that it was] prepared to implement an intensive and continuous program of information...to acquaint its membership and the educational community-at-large about the proposed policymaking system and services."

Within four months after making its proposal, the National School Boards Association received notification that the United States Office of Education's support for such a research activity would be forthcoming. And between February, 1969, and February, 1970, the research was carried on under the aegis of the NSBA School Board Policy Project (Policy Project).
CHAPTER 2

Methods: How the Objectives Were Achieved

The Policy Project took as its mandate the development of a comprehensive program for meeting its broadest goals. The various models to be produced by the research activity would be tightly interlocked, each serving the other. The nature of the study did require the employment of a variety of skills and abilities but not the employment of any new or unusual or complicated methods of research.

The Project conducted no surveys nor did it create any hypotheses for testing. Consequently, it found no occasion to employ the methodologies of statistical research.

However, comments are in order concerning the methods used to meet two specific objectives—one, the collection of policy samples for exhibit purposes; and two, the creation of the school board policy classification system.

The Collection of Policy Samples

The solicitation of policy samples and reprint rights was made through a form letter. The precedents for acquiring such documents are many, including the voluntary and informal exchanges of policies among local school boards through the good offices of NSBA's affiliated state school boards associations that are carried on continuously. Also, NSBA's previous work in this field has found school boards most willing to share policy statements if they have them.

The Project wrote to a total of 287 selected school districts for copies of local policy manuals. Of this total, 137 school districts had been identified by state school boards associations and other sources as being likely to have an up-to-date set of written policies; the remaining 150 school districts were randomly selected as being representative of every geographic region of the United States as determined by the five standard categories employed by the U.S. Bureau of the Census. Of the total of 287 districts solicited, 115 responded to the request for manuals and for a written

8. For example, the "statesman's knowledge of policy, the manager's ability to coordinate and expedite, the clerk's ability to attend to small details, the taxonomist's ability to classify information, the research librarian's ability to nose out needed information, and the writer's ability to write clearly."

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"agreement to share (policy) information." In addition, manuals came to the Project from other sources, and by February, 1970, the Project's collection numbered 170 manuals to form the nucleus for the Clearinghouse model. (See #6, p. 15.)

Accompanying the search for manuals was the search for resolutions, formal statements, and similar policy reference documents enunciated by professional associations and certain other organizations concerned and informed about American education. Such documents were conceived of as "policy information statements"--informed and important utterances that would be valuable to school boards as reference resources. A representative list of organizations solicited for such resources appears in Appendix I.

Of all documents collected--both policies and "information statements"--a total of 202 were selected for codification as exhibits in the prototype policy reference manual. (See #4, p. 15.) The breakdown of these 202 exhibits is as follows:

--165 are samples of exemplary school board policies;
--11 are samples of exemplary administrative rules;
--26 are "information statements" selected from various organizations.

The Creation of the Classification System

The classification system represents an arrangement of 13 groups (classes) into which policy terms (descriptors) belong.

The classes as finally adopted are as follows:

A--SCHOOL DISTRICT ORGANIZATION
B--SCHOOL BOARD OPERATIONS
C--GENERAL SCHOOL ADMINISTRATION
D--FISCAL MANAGEMENT
E--BUSINESS MANAGEMENT
F--FACILITY EXPANSION PROGRAM
G--PERSONNEL
H--NEGOTIATIONS
I--INSTRUCTIONAL PROGRAM
J--STUDENTS
K--GENERAL PUBLIC RELATIONS
L--INTERORGANIZATIONAL RELATIONS (education agencies excluded)
M--RELATIONS WITH OTHER EDUCATION AGENCIES

The classification system is, in essence, a term-association
list in which all terms are codified. This enables users to describe policy and policy-information documents to a desired level of specificity for input into a looseleaf binder system of document storage. Contrarily, the coding permits users to describe the information required at output in mutually precise terms.

The classification system, then, serves as an "authority list." It brings into coincidence the "language of documents" and the "language of questions." It provides the "rules of communication" for operating a policy information system successfully.

The classification system is intended to conform to sound principles of information storage and retrieval, to sound principles of school governance, and also to the mandates of practicality. The system's ultimate success or failure, will depend, of course, on the extent of its day-to-day usefulness as a management tool to facilitate board operations.

Basic to the system is the vocabulary of policy development descriptors. In the words of the ERIC Thesaurus, "Descriptors are technically meaningful terms or short phrases that are used to characterize a document and which may also be used as index entries. Descriptors perform a dual function in a storage and retrieval system. First, they permit the indexer to describe the subject elements of a document so that it may be stored in a system for future search and retrieval purposes. Second, they represent the raw material from which a searcher may construct a question for the system to answer. In this sense, the body of descriptors is the communication link between the human operators and the users of the system and the system itself. Without a structure to satisfy language, scope, and usage, communication with the system would be impaired."10

The Policy Project's classification system for school board policies includes more than 1,000 discrete terms--e.g., "Underground Newspapers," "Psychological Testing," "Nepotism," "Scope of Professional Negotiations," etc. These terms set

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10. Ibid.
forth specific issues and concerns for possible school board action at the policy development level.

The final 1,000 terms included in the vocabulary were selected and edited from a collection of more than 10,000 "candidate" terms drawn from many sources, including actual school board policy manuals; the 1960 NSBA-NEA Joint Committee's Reference Manual on School Board Policies; the Information Retrieval Thesaurus of Educational Terms (Case Western Reserve, 1968); Financial Accounting For Local and State School Systems: Handbook II (Office of Education, 1966); the Thesaurus of Eric Descriptors, Second Edition (OE, 1969); and professional journals.

Whenever convenient, EPS descriptors were made to coincide with the terminology of the Educational Resources Information Center, as prescribed by the ERIC Thesaurus, in order to advance the cause of a standard, commonly-understood "language of education." This is why, for example, EPS uses "Students" instead of "Pupils" and "Professional" instead of "Certified." In certain instances, however, the Policy Project departed from ERIC as in the EPS term "School Board" instead of the ERIC descriptor "Board of Education." Why? Because "school board" is a generic term--as in National School Boards Association. All boards of education are school boards, but all school boards are not boards of education. In several New England states, for example, the school board is known as the "school committee."

The coding or "tracking" of terms is by letter rather than number. Letter encoding offers two major advantages over number encoding for the task at hand: (1) A letter system offers more flexibility. (The coder has available 26 separate letters to use compared to only ten digits.) (2) A letter system requires no decimal points. (This tends to reduce the likelihood of errors of reproduction and filing.)

The classification system is supplemented by an alphabetized listing of more than 1,400 terms. Its purpose is to help users find their way quickly to coded descriptors. This index includes both terms used in the classification system and also terms that are not regarded as formal descriptors. These "extras" are cross-referenced to official descriptors. Some of these topics are synonyms. (E.g., Administrative Regulations see "Administrative Rules.") Others are included to show where they might be placed into the system by local classifiers. (E.g., Jury Duty see "Leaves and Absences.")

In addition, major descriptors appear in several places in the index. This again is to facilitate the user's search for correct term placement in the system.
CHAPTER 3

Results: A National System for Developing
School Board Policies is Born

As mentioned in Chapter 1, the NSBA--in the project proposal--pledged to follow a vigorous course of action and service to its membership and to the educational community-at-large in order to put to their most productive use the fruits of the proposed development activity...[that it was] prepared to produce and distribute through its usual channels upwards of 3,000 copies of the proposed manual and handbook;...[that it was] prepared to assume responsibility for the continuing operation of the proposed clearinghouse and to produce and to seek the widest possible distribution to the proposed clearinghouse publication;...[and that it was] prepared to implement an intensive and continuous program of information...to acquaint its membership and the educational community-at-large about the proposed policymaking system and services."

This pledge has been and is still being fulfilled.

In October, 1969, the Project's activities were proceeding ahead of schedule, and in consultation with the Project's advisers--school board members, school administrators, a documentation specialist, a school attorney, and staff members of state education agencies and state school boards associations--the NSBA decided to announced the inauguration in January, 1970, of an important new service to assist the nation's school boards with the task of developing effective educational policies and keeping them up-to-date.

This program is called the Educational Policies Service of the National School Boards Association (EPS/NSBA). EPS/NSBA employs and has absorbed the fruits of the Policy Project's research. The responsibility for producing the necessary printed materials and disseminating information about the Service has been borne by the National School Boards Association with the cooperation of its affiliated state associations. The Service is offered on a low cost membership fee basis to local school districts.

The launching of EPS/NSBA represents, then, both the culmination of the Policy Project's mission and the achievement of all objectives. This is illustrated by the following events:

--EPS/NSBA has published a completely new school board policy classification system. Features of the classification...
system are described in Chapter 2, and the full taxonomy is reproduced as Appendix II.

--EPS/NSBA has published a new Educational Policies Reference Manual, which includes the classification system, an alphabetized index of terms, and a "starter file" of 201 exhibit documents, all coded to the classification system. Examples of these exhibit documents appear as Appendices III, IV, and V.

--EPS/NSBA has published a 48-page handbook entitled, School Board Policy Development for the '70s, which provides a step-by-step guide to the utilization of the full system. A page from the handbook, illustrating its style as a "recipe book" appears as Appendix VI.

--EPS/NSBA has established a School Board Policy Information Clearinghouse to serve as a national repository for the collection of school board policy manuals and related literature and to provide reference service to the nation's school boards.

--EPS/NSBA has begun the publication of a monthly six-page Clearinghouse newsletter entitled Updating School Board Policies, to provide school boards with a steady stream of information about policy development theory and practices.

**Dissemination Activities**

To meet its pledge to inform school boards and the educational leadership community in general about both the Policy Project and the new Service, NSBA has employed a variety of devices. Both news and formal announcements appeared on five consecutive months between October, 1969, and February, 1970, in the pages of the NSBA's own publication, The American School Board Journal, which reaches a readership of more than 40,000 school board members and school administrators. Information has appeared regularly in the pages of the NSBA Newsletter, a monthly publication for state school board leaders. In addition, news announcements have been printed in almost all the journals and/or newsletters published by state school boards associations. NSBA has also mailed news announcements to more than 700 education and general news editors, and it has mailed announcements concerning EPS/NSBA to 13,000 school districts.

Finally, the Principal Investigator has had occasion to speak about the Policy Project and/or the development of
EPS/NSBA at the 1969 Annual Convention of the National School Boards Association in Miami; at a Title III conference on school board policy development in Santee, S.C.; at the Illinois and Wisconsin state school boards associations annual meetings; and at the 1970 Annual Convention of the American Association of School Administrators.

A vigorous program of dissemination will continue beyond the termination of the Policy Project.

The response to the dissemination activities has been encouraging. More than 600 school boards registered their districts as members of EPS/NSBA before the program started in January, 1970. This early indication of interest might well be regarded as an excellent omen for the future.

The Case for Deliberate Speed

In a more leisurely era than ours, a strong case could be made for a research effort as important as the one described herein to be allotted a generous block of time to meet its objectives. Undoubtedly, the Policy Project staff would have felt more "comfortable" had it had the luxury of two or even three years to develop and test its various models. But this would have been a luxury; the necessity—in the opinion of the National School Boards Association—is to provide assistance and service to school boards now. These words, from the NSBA publication, New Dimensions in School Board Leadership, describe the sense of urgency that motivated the Policy Project to work at "all deliberate speed":

The need for "intelligent, responsible" leadership for democracy's make-ready institutions, the public schools, has never been more urgent. School boards are on the front line in a war that's getting hotter. The nation's grave problems of race and poverty, the phenomenon of student unrest, the taxpayer's revolt, teacher militancy—all these forces are testing the mettle (and the staying power) of the nation's school board members.

School boards—which have considered it worthy all along to work for the unanimous vote, to establish consensus, and to promote harmonious board-staff community "teams"—have few precedents for dealing with dissent, controversy, and today's hot issues. By and large, school boards are relatively unskilled as "managers of diversity and change."

22
Some boards are responding to the crisis by muddling through. In meeting after meeting, board members absorb themselves in matters of routine and trivia.

Many boards are not planning for change but rather simply reacting to the steady hammer-beat of one demand after another. They are in a state of "future shock."

There are good, earnest people on school boards everywhere. The talent pool has perhaps never been richer.

Yet the forces that militate against effective school board service are becoming almost overwhelming.

On the eve of the 1970s the traditional role of the school board is in question; there is a crisis in authority at the local level of school governance. 11

The development of the Policy Project models represent a constructive response from the National School Boards Association to this "crisis in authority."

CHAPTER 4

Conclusions and Recommendations: The Challenge of Accountability

Implicit in the policy-development program described in these pages are these assumptions:

--Public education is everybody's business.

--The governance of public education will be best served if there is a balance of power in the decisionmaking structure.

These assumptions are reflected by the descriptors which pervade the policy classification system. They cover such matters as Staff Involvement in Policy Drafting; Community Involvement in Decisionmaking; Student Involvement in Decisionmaking; Attorney Involvement; Consultant Involvement; School-City Hall Relations; Interdistrict Relations; Relations With Title III Centers, With the State, With Churches, With Colleges, With Museums and Libraries, With Professional Organizations, With Neighborhood Associations, etc., etc., etc.

Such descriptors acknowledge the existence of a vast pool of intelligence to draw from in efforts to set matters right for America's public schools. Nationwide, this pool numbers more than 20,000 school administrators and other professional education leaders; more than two million teachers; and millions upon millions of interested, knowledgeable, concerned, and affected adults and young people who have ideas and talents to offer the cause of the advancement of education. Such are the supportive forces available to 100,000 school board members.

A Sophisticated View of Policies

It has been an article of faith in American education that the school board makes policy; the administration executes it. In this research, we have accepted the classic distinction between the "legislative" and/or adjudicative function of governing boards (the policymakers); and the function of school administrators (the executors of policies). We have preserved the definition of "board policies" and "administrative rules" that was recorded by the NSBA-NEA
Joint Committee in the Manual developed in 1960.12

Such distinctions are useful. In actual practice, they should be serviceable most of the time. But not all of the time.

For one thing, the line between "board" and "administration" does not always hold fast in the minds of school patrons and school staff. Neither public citizens nor teachers are willing to differentiate between who is responsible--board or administration--for a given problem. Citizens, especially in the cities, are bypassing the school superintendent's office and taking their complaints right into the board room. The public is holding the board itself accountable. "Today's world," it has been said, "is not programmed for yesterday's school board. Yesterday's board tended too frequently to avoid controversy at all costs. Today, change and conflict are inescapable to be dealt with constantly. Today, school boards have to deal with impatient, angry constituents who are demanding instant solutions to almost impossible problems. The work of today's board is often carried on before the eyes of raucous onlookers who want satisfaction now. If leadership is to have meaning in the 1970s, the American school board will have to learn how to manage and not just react to it."13

For another thing, the line between "policies" and "rules never did hold fast--and the distinction is less clean today than in years past. State laws and federal guidelines, for example, often detail the how, whom, and when of "rules" as well as the what and why of "policies." Yet state and federal edicts are, in effect, policies--mandated policies. Also, contracts negotiated between board and employee groups--both professional and nonprofessional--often yield both

12. "POLICIES are principles adopted by the school board to chart a course of action. They tell what is wanted and may include also why and how much. They should be broad enough to indicate a line of action to be taken by the administration in meeting a number of problems day-after-day; they should be narrow enough to give the administration clear guidance. ADMINISTRATIVE RULES are the detailed directions that are developed by the administration to put policy into practice. They tell how, by whom, where, and when things are to be done." From The Reference Manual on Written School Board Policies, NSBA-NEA Joint Committee. Evanston, Ill.: National School Boards Association, 1960. Pages 4-5.

highly specific "rules" and also broad "policies." But once signed by the board, the negotiated contract has to be considered as a policy document.

Perhaps as much as 80 to 90% of what school boards do has been predetermined by state law, federal guidelines, court decisions, negotiated agreements, and budget limitations. Regardless, school boards are held accountable as the responsible governing bodies of the nation's public schools. In colloquial terms, the buck stops at the board room door.

The school board that accepts the mantle of accountability will give priority to its policy development responsibilities. And it will recognize that the process of board policy development and administrative execution of policy is a much more complex, delicate, and sophisticated activity than heretofore described in textbook literature.

Policy development is a process that recognizes many antecedent movements that come to the board's attention. It involves many forces beyond the board's control. It involves consultation, planning, and study in cooperation with many groups and organizations and with many individuals, laymen and professional educators alike. It involves keeping the lines of communication open at all times. No school board makes policy in isolation from antecedent movements and forces and existing pressures. Yet the board that holds itself accountable can exercise considerable power at the crucial moment. Boards do indeed initiate policy, but equally important, they serve as vital policy brokers and policy adjudicators. The school board's final policy determination represents key decisions that unlock many other decisions and actions.

In this context, policy development remains one of the paramount responsibilities of responsible school boards. And in exercising this responsibility, school boards become managers of change and diversity and viable forces for the advancement of public education. They become "education's ruddermen."

"It is at this point where the school board can serve a highly creative role. As a long-established occupant of the community's center stage, it is in a unique position for taking the initiative in advancing the cause of mutual planning, coordination, and execution of the total, interlocking educational mission. Vis-a-vis the other partners-in-education, the school board can serve as an 'enabling agency' that helps catalyze total community progress." 14

The models created by the research reported herein and the Educational Policies Service developed from these models are in harmony with the new challenge before school boards to become managers of change.

Can the school boards of the 1970s fulfill this new role? It is vitally important to the nation that they do so. Yet the task of preparing school boards for this challenge is large. The full resources of the National School Boards Association, including EPS/NSBA, will be brought to bear on this task in the months and years ahead. Yet these resources are limited. Support will be required if the task is to be fully achieved. Hence, the recommendations which follow.

Recommendations

The research results reported herein point unerringly to steps which must be taken if the fruits of these labors are to meet their full potential. That potential is nothing less than improving the quality of local school governance throughout these United States.

1. Inservice education of school board members and school administrators. There is need for a national program of workshops and similar inservice education experiences designed to develop expertise among school board members and school administrators in modern policy development practices exemplified by the materials produced under Contract No. OEC-5-9-230179-0044.

2. Information network linkage. There is need to link the strong information gathering and dissemination facilities of the NSBA policy information clearinghouse with other educational information centers. Such a linkage is necessary to help fulfill the requirements of both professional educators and lay educational leaders for a steady flow of current and authoritative information in "consumer form."

3. Special assistance for community college boards. The proliferation of community colleges in the United States requires that the governing boards of these many new institutions be brought into the mainstream of current practice and theory in educational governance. The school board policy development models created under Contract No. OEC-5-9-230179-0044 may be adapted from their present form to the particular needs of these boards. But if adaptations are to be made by separate boards in isolation from one another, the results --in effect--would proliferate many individualized policy
systems rather than provide a nationally standard and authoritative system available to all community college boards. A standard system, adapted from new taxonomy and developed under the auspices of the National School Boards Association's Council of Community College Boards, holds the best promise for developing sound practices in policy development among the nation's community college boards.
APPENDIX I

A Representative List of Organizations Solicited for Resolutions and/or Other Statements Potentially Useful as Guidelines for the Development of Local School Policy

Adult Education Association of the USA
American Association for Health, Physical Education and Recreation
American Association for the Advancement of Science
American Bar Association
American Classical League
American Educational Research Association
American Home Economics Association
The American Legion
American Library Association
American Personnel and Guidance Association
American Public Health Association
American Social Health Association
Association for Childhood Education International
Association for Student Teaching
Association of Classroom Teachers
Association of College Admission Counselors
Child Study Association of America, Inc.
Child Welfare League of America, Inc.
Columbia Scholastic Press Association
Conservation Education Association
Council for Basic Education, Inc.
Council for Exceptional Children
Council of Educational Facility Planners
Council on Social Work Education, Inc.
Department of Audiovisual Instruction
Department of Elementary-Kindergarten-Nursery Education
Department of Home Economics
Education Writers Association
Educational Film Library Association, Inc.
Educational Press Association of America
International Reading Association
Joint Council on Economic Education
Modern Language Association of America
Music Educators National Conference
National Art Education Association
National Association for Gifted Children
National Association for Public School Adult Education
National Association for Retarded Children, Inc.
National Association of Social Workers
National Association of State Directors of Special Education
National Association of Student Personnel Administrators
National Council for the Social Studies
National Council for Teachers of English
National Federation of Modern Language Teachers Association
National Fire Protection Association
National Kindergarten Association
National Society for the Study of Education
National Vocational Guidance Association
NAACP
Speech Association of America
Urban League (National)
U.S. National Commission for UNESCO
Veterans of Foreign Wars
APPENDIX II

A Taxonomy for a School Board Policy Codification and Retrieval System

A SCHOOL DISTRICT ORGANIZATION
B SCHOOL BOARD OPERATIONS
C GENERAL SCHOOL ADMINISTRATION
D FISCAL MANAGEMENT
E BUSINESS MANAGEMENT
F FACILITY EXPANSION PROGRAM
G PERSONNEL
H NEGOTIATIONS
I INSTRUCTIONAL PROGRAM
J STUDENTS
K GENERAL PUBLIC RELATIONS
L INTERORGANIZATIONAL RELATIONS (education agencies excluded)
M RELATIONS WITH OTHER EDUCATION AGENCIES
Signs and Symbols Used in the School Board Policy Codification and Retrieval System

SN Scope Note—a brief statement used when necessary in order to clarify and/or limit the intended use of a descriptor entry.

Administrative Personnel
SN For school management and supervisory personnel below district superintendent level.

Also A prefix to a parenthetical code to indicate that the identical term (and identical school board policy) appears elsewhere in the classification system.

AFC (ALSO EBBD) Emergency Closings
EBBD (ALSO AFC) Emergency Closings

Cf. A prefix to a parenthetical code to indicate that a related term (and related school board policy) appears elsewhere in the classification system.

JCDAC (CF. IDBB) Drug Use
IDBB (CF. JCDAC) Drug Education

-R An affix to a code to indicate that the statement it describes is an administrative rule, not a school board policy.

(*) Parenthetical codes with asterisks (and accompanying terms) are not officially part of the EPS classification system but are included to suggest how the system may be expanded or modified by the user.

(HAHA)* Recognition of Professional Staff Negotiating Organization
### A--SCHOOL DISTRICT ORGANIZATION

**AA** School District Legal Status  
*SN An information category.*  
**AAA** Decentralization Legal Status

**AB** School Board Legal Status  
*SN Largely an information category offering little if any leeway for board action.*  
**ABA** Authority  
**ABB** Powers and Duties (Cf. BBBA)  
**ABC** Board Members (Cf. BBB)  
**ABCA** Number  
**ABCB** Qualifications  
**ABCC** Terms of Office  
**ABCD** Method of Election (Cf. LDAC)  
**ABCDAA** Unexpired Term Fulfillment  
**ABCE** Resignation  
**ABCF** Removal from Office  
**ABD** School Superintendent Legal Status (Cf. CE)

**AC** School District Organization Plan

**AD** School District Attendance Areas (Cf. JBCC)  
**ADA** School Census

**AE** School Year  
**AEA** School Calendar  
**AEAA** Vacations  
**AEAB** Holidays  
**AEB** Extended School Year (Cf. IDC)  
**AEBA** Summer Sessions (Cf. IDCA)

**AF** School Day  
**AFA** Double Sessions  
**AFB** Evening Sessions  
**AFC** Emergency Closings (Also EBBB; Cf. JGFA)
BA Goals and Objectives

BB Internal Organization
BBA Officers
BBAA Method of Election (Cf. BCAA)
BBAB Duties
BBABA President
BBABB Vice-President
BBABC Secretary
BBABD Clerk
BBABE Treasurer
BBABF Parliamentarian

BBB Members (Cf. ABC)
BBBA Duties (Cf. ABB)
BBBB New Member Orientation
BBBC Board Member Development Opportunities
BBBD Bonded Members
BBBE Compensation

BN Includes salaries, expense allowances, and benefits such as liability insurance coverage.

BBC Board Committees
BBCA Standing Committees
BBCB Temporary Committees
BBD Committees of the Whole
BB Board-School Superintendent Relations (Also CF)
BBE Attorney
BBF Advisory Committees (Also KCBA)
BBFA Types and Functions
BBFP Method of Appointment
BBFC Organization
BBFD Resources
BBFDA Personnel
BBFDB Materiel
BBFDC Financial
BBFE Liaison
BBFF Reporting
BBFG Dissolution
BBG Consultants (Cf. CJ, FDAA, FEAA)

BC Meetings
BCA Types
BCAA Annual (Cf. BBAA)

SN The organizational meeting of the board, usually once a year, when the board elects its officers.

BCAB Regular
BCAC Special
BCAD Adjourned
BCAE Public Hearings (Also KCC; Cf. DCDB)
Procedures

BCBA Time and Place
BCBB Notification
BCBC Preparation
BCBD Agendas
BCBE Distribution of Materials
BCBF Rules of Order

BCBFA Suspension of the Rules
BCBFB Voting Method
BCBH Minutes
BCBI Public Participation (Also KCA)
BCBJ News Coverage (Cf. KBCC)
BCBJA Press Services (Also KBCCA)
BCBJB Broadcasting and Taping (Also KBCCB)
BCBK Executive Sessions

BD Policy Development (Cf. CM)
BDA Policy Development System Adoption
BDAA Policy Draft Writer

SN The person designated by the board, often an administrator, who is responsible for recasting group consensus about policy recommendations into acceptable prose for further deliberation and/or action.

BDB Policy Drafting

SN The ongoing process of planning, gathering information, and preparing recommendations relative to the need for new policies and/or the revision and repeal of existing policies.

BDDA Policy Development System Adoption
BDBA Attorney Involvement
BDBB Staff Involvement (Also GAC)
BDBC Community Involvement (Also KCBB)
BDBD Student Involvement (Also JCB)

BDC Policy Adoption

SN The official action of the board that makes new and/or revised policy statements operable.

BDE Policy Review

SN The periodic assessment by the board of its existing policies and policy development system.

BDF Review of Administrative Rules (Also CMAD)
BDG Administration in Policy Absence (Also CMB)
BDH Suspension of Policies

BE School Board Records
BF Annual Reports
BG Memberships
BGA Area School Boards Association (Also MGB)
BGB State School Boards Association (Also MGB)
BGC National School Boards Association (Also MGB)
BH Ethics
C--GENERAL SCHOOL ADMINISTRATION

CA
Goals and Objectives

CB
Ethics

SN An information category since ethics are determined by a profession and not imposed upon it.

CC
Organization Charts
CCA District
CCB District Departments
CCC School Buildings

CD
Line and Staff Relations

CE
School Superintendent (Cf. ABD)
CEA Qualifications
CEB Duties
CEC Recruitment
CED Appointment
CEE Compensation and Benefits
CEF Travel Expenses
CEG Professional Development Opportunities
CEH Consulting
CEI Evaluation
CEJ Separation
CEK Resignation
CEL Retirement

CF
Board-School Superintendent Relations (Also BBD)

CG
Administrative Personnel

SN For school management and supervisory personnel below district superintendent level.

CGA Compensation Guides and Contracts
CGB Positions
CGBA Qualifications and Duties

SN Job descriptions listed and coded (CGBAA, CGBAB, etc.) job-by-job.

CGC Recruitment
CGD Hiring
CGE Assignment
CGF Orientation
CGG Probation
CGH Supervision
CGI Evaluation
CGJ Promotion
CGK Tenure
CGL Transfer
CGM Separation
CGN Resignation
CGO  Retirement
CGP  Working Conditions
CGPA  Health Examinations
CGPB  Time Schedules
CGPC  Work Load
CGPD  Travel Expenses
CGPE  Nonschool Employment
CGPEA  Consulting
CGPF  Professional Leaves and Absences
       Sabbaticals
CGPFA  Conferences and Visitations
CGPG  Personal Leaves and Absences
       Emergency and Legal
CGPGA  Illness
CGPGB  Maternity
CGPGC  Military
CGPGD  Religious
CGPGE  Bereavement
CGPGF  Vacations

CH  Part-Time Administrators

CI  Administrative Intern Program

CJ  Consultants (Cf. BBG, FDAA, FEAA)

CK  Professional Development Opportunities

CL  Councils, Cabinets, and Committees
CLB  Types and Functions
CLA  Method of Appointment
CLC  Organization
CLD  Resources
CLDA  Personnel
CLDB  Materiel
CLDC  Financial
CLE  Liaison
CLF  Reporting
CLG  Dissolution

CM  Policy Implementation (Cf. BD)
CMA  Administrative Rules
CMAA  Rules Drafting
CMAAA  Staff Involvement (Also GAC)
CMAAB  Community Involvement (Also KCBB)
CMAAC  Student Involvement (Also JCB)

CMAB  Rules Adoption
CMAC  Rules Dissemination
CMAD  Rules Review (Also BDF)

CMB  Administration in Policy Absence (Also BDG)
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### D--FISCAL MANAGEMENT

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## E--BUSINESS MANAGEMENT

*SN Excludes fiscal management.*

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| EC | Equipment and Supplies Management |
| ECA | Insurance Program |
| ECAA | Casualty |
| ECAB | Liability |
| ECAC | Self-Insurance |
| ECB | Receiving |
| ECC | Warehousing |
| ECD | Distribution |
| ECE | Leasing and Renting (Cf. DFG) |
| ECF | Equipment Maintenance |
| ECG | Records |
| ECG A | Types |

| ED | Student Transportation Management |
| EDA | Carrier Types |
| EDA A | School-Owned Buses |
| EDA B | Leased Buses |
| EDA C | Contracted Bus Service |
| EDA D | Public Carriers |
| EDA E | Private Vehicles |
EDB Insurance Program
EDBA Casualty
EDBB Liability
EDBC Self-Insurance
EDC Safety
EDCA Safety Inspection
EDCB Student Conduct (Cf. JCD)
EDD Scheduling and Routing
EDDA Special Use of School Buses
EDDB Walkers and Riders (Also JGGA)
EDE Maintenance Program
EDF Records
EDFA Types

EE School Lunch Services Management
EEA Free Lunch Policy (Also JGHA)
EEB Sanitation Inspections
EEC Records
EECA Types

EF Data Management
SN For policies of a general nature on the generation and control of statistical and other information as desired by the district and/or required by state and federal regulations. See also "Records" and "Reports" in Index.
EFA Data Collection Purposes
EFB Data Collection and Retrieval Methods
EFC Data Analysis
EFD Data Dissemination
EFDA To Education Agencies (Cf. DD, MI, MJ)
EFDB To Staff (Cf. HAIDA, HBIDA)
EFDC To Public (Cf. KL)
FACILITY EXPANSION PROGRAM

SN includes new construction as well as related activities such as acquiring sites, plant remodeling or modernizing, and leasing or renting property to meet expansion needs.

FA Goals and Objectives

FB Building Committees

SN Applicable where such committees function by law.

FBA Legal Status

FBB Types and Functions

FBC Method of Appointment

FBD Organization

FBE Resources

FBEA Personnel

FBEB Materiel

FBEC Financial

FBF Liaison

FBG Reporting

FBH Dissolution

FC Public Information Program (Cf. KB)

FD Long-Range Planning

FDA Long-Range Planning Involvement

FDAA Consultants (Cf. BBG, CJ, FEAA)

FDAB Architects

FDAC Attorney

FDAD Staff

FDAE Community (Cf. KCBD)

FDAF Local Government

FDAG State Government

FDAH Federal Government

FDB Long-Range Needs Determination

FDBA Existing Facilities Inventory

FDBAA Existing Facilities Use

FDBAB Existing Facilities Use Evaluation

FDBB Obsolescence Determination

FDBC Instructional Needs Projections

FDBD Enrollment Projections

FDBE Community Use Needs Projections

FDBF Site Availability Projections

FDBFA Investment in Sites

FDBG Cost Projections

FDC Naming New Facilities

FE Project Planning

FEA Project Planning Involvement

FEAA Consultants (Cf. BBG, CJ, FDAA)

FEAB Architects
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<td><strong>SN</strong> Detailed, precise, expert presentation of a plan or proposal for educational facilities including equipment, classrooms, laboratories, curriculum, etc.</td>
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<td>Architectural Programing</td>
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<td><strong>SN</strong> The process of identification and systematic organization of the functional, architectural, structural, mechanical, and aesthetic criteria which influence decisionmaking for the design of a functional space, building, or facility.</td>
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GA  General Section
    SN  Policies applicable to all school employees.

GAA  Goals and Objectives
    GAAA  Equal Opportunity Employment

GAB  Budget Planning Involvement (Also DCCB)

GAC  Policies and Rules Development Involvement (Also BDBB, CMAAA)

GAD  Professional Development Opportunities
    GADA  Requirements

GAE  Complaints and Grievances

GAF  Staff-Student Relations (Also JP)

GAG  Conflicts of Interest (Cf. GBU)
    GAGA  Nepotism

GAH  Staff-Community Relations (Also KD)
    GAHA  Participation in Community Activities (Also KDA)
    GAHB  Political Activities
    GAHC  Public Appearances (Also KDB)

GAI  Solicitations
    GAIA  Solicitations by Staff Members (Also KDCA)
    GAIB  Solicitations of Staff Members (Also KDCB)

GAJ  Gifts
    GAJA  Gifts by Staff Members
    GAJB  Gifts to Staff Members (Cf. KHD, JLA)

GAK  Records
    GAKA  Types
    GAKB  Public Use
    GAKC  Disposition

GAL  Salary Deductions (Also DJCB)
GB Professional Personnel Section
SN Excludes district school superintendent and other school management and supervisory personnel classified under CG policies.

GBA Compensation Guides and Contracts

GBAA Merit System

GBB Positions

GBBA Qualifications and Duties
SN Job descriptions listed and coded (GBBAA, GBBAB, etc.) job-by-job.

GBC Recruitment

GBD Hiring

GBE Assignment

GBF Orientation

GBG Probation

GBH Supervision

GBI Evaluation

GBJ Promotion

GBK Suspension

GBL Tenure

GBM Transfer

GBN Separation

GBO Resignation

GBP Reemployment

GBQ Retirement

GBR Working Conditions

GBRA Health Examinations

GBRB Time Schedules

GBRC Work Load

GBRD Staff Meetings

GBRE Extra Duty

GBRF Travel Expenses

GBRG Nonschool Employment

GBRGA Consulting

GBRGB Tutoring for Pay
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SN An information category since ethics are usually determined by a profession and not imposed upon it.
Nonprofessional Personnel Section

SN  Excludes school management and supervisory personnel classified under CG policies.

Compensation Guides and Contracts

Merit System

Positions

Qualifications and Duties
SN  Job descriptions listed and coded (GCBAA, GCBAB, etc.) job-by-job.

Recruitment

Hiring

Assignment

Orientation

Probation

Supervision

Evaluation

Promotion

Suspension

Tenure

Transfer

Separation

Resignation

Reemployment

Retirement

Working Conditions

Health Examinations

Time Schedules

Work Load

Overtime Pay

Travel Expenses

Nonschool Employment
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GDRHD  Military
GDRHE  Religious
GDRHF  Bereavement
GDRI   Vacations

GDS    Employee Organizations (Cf. HAH, HBH)
H--NEGOTIATIONS

HA  Professional Personnel Negotiations
HAA  Legal Status
HAB  Goals and Objectives
HAC  Scope of Professional Negotiations (Cf. HAIAC)
HAD  Board Rights and Duties
HAE  Board Negotiating Agents
HAF  Superintendent's Role
HAG  Professional Staff Rights
HAAH  Professional Staff Negotiating Organization (Cf. GBS, GDS)
HAHA  Method of Determination
HAHB  Privileges
HAHBA  Use of School Facilities
HAHBB  Use of School Equipment
HAHBC  Use of School Time
HAI  Bargaining Meeting Procedures
HAIAB  Time and Place
HAIAAA  Time Limits
HAIAB  Notification
HAIAC  Agenda Determination (Cf. HAC)
HAIAD  Distribution of Information
HAIADA  Research Assistance (Cf. EPDB)
HAIABE  Quorum
HAIABF  Rules of Order
HAIABG  Minutes and Records
HAIABH  Progress Reporting
HAIABA  To Staff and Board
HAIABBA  To Press and Public
HAIAC  Preliminary Agreement Disposition
HAIACD  Ratification Procedures
HIAL  Announcement of Agreement
HAM  Impasse Procedures
HAMA  Mediation
HAMBB  Fact Finding
HAMBC  Arbitration
HAN  Sanctions and Slowdowns
HAO  Boycotts and Strikes
| HB | Nonprofessional Personnel Negotiations |
| HBA | Legal Status |
| HBB | Goals and Objectives |
| HBC | Scope of Nonprofessional Negotiations (Cf. HBIC) |
| HBD | Board Rights and Duties |
| HBE | Board Negotiating Agents |
| HBF | Superintendent's Role |
| HBG | Nonprofessional Staff Rights |
| HBH | Nonprofessional Staff Negotiating Organization (Cf. GCS, GDS) |
| HBHA | Method of Determination |
| HBHB | Privileges |
| HBHBA | Use of School Facilities |
| HBHB | Use of School Equipment |
| HBHBC | Use of School Time |
| HBI | Bargaining Meeting Procedures |
| HBIAA | Time and Place |
| HBIIB | Time Limits |
| HBIIC | Notification |
| HBIID | Agenda Determination (Cf. HBC) |
| HBIIE | Distribution of Information |
| HBIDA | Research Assistance (Cf. EFDB) |
| HBIIF | Quorum |
| HBIIG | Rules of Order |
| HBIIH | Minutes and Records |
| HBIHA | Progress Reporting |
| HBIHB | To Staff and Board |
| | To Press and Public |
| HBJ | Preliminary Agreement Disposition |
| HBK | Ratification Procedures |
| HBL | Announcement of Agreement |
| HBM | Impasse Procedures |
| HBMA | Mediation |
| HBMB | Fact Finding |
| HBMC | Arbitration |
| HBN | Walkouts and Slowdowns |
| HBO | Boycotts and Strikes |
I--INSTRUCTIONAL PROGRAM

IA Philosophy
IAA Academic Freedom

IB Goals and Objectives

IC Curriculum Development
ICA Resources
ICAA Personnel
ICAB Materiel
ICAC Financial

ICB Planning
ICC Research (Cf. ME)

ICD Pilot Projects

ICE Pilot Project Evaluation (Cf. IJ)

ICF Curriculum Adoption
ICFA Curriculum Guides and Course Outlines

ID Curriculum Design
IDA Basic Program

SN Includes the full range of programs designed

to meet the individual needs of the great ma-

jority of students and beginning, in some dis-

tricts, with preprimary areas of instruction

and extending, in some districts, beyond grade

12. Basic skills instruction, citizenship edu-

cation, conservation education, occupational

education, home economics, and the standard

academic areas of instruction are regarded here

as component elements of the Basic Program.

IDB Health Education

IDBA Sex Education

IDBB Drug Education (Cf. JCDAC)

IDC Extended Programs (Cf. AEB)

IDCA Summer Program (Cf. AEBA)

IDCB Evening Program

IDCC School Camp Program

IDCD Travel Study Program (Cf. JQK)

IDCE Advanced College Placement (Also MFC)

IDCF Work-Study Programs (Also LEGA; Cf. JJC)

IDD Special Programs (Cf..JQ)

IDDA Disadvantaged

IDDB Remedial and Therapeutic

IDDC Homebound Instruction

IDD Gifted Student

IDDE Driver Training

IDDF Physically Handicapped (Cf. JQA)

IDDG Mentally Handicapped (Cf. JQB)

IDDH Perceptually Handicapped (Cf. JQC)

IDDI Emotionally Disturbed (Cf. JQD)

IDE Cocurricular Activities (Cf. JH)
IDF  Interscholastic Activities (Also MDB)
IDFA  Interscholastic Athletics (Also MDBA)
IDG  Adult Education Program (Cf. JQJ)
IDGA  Manpower Training Program

IE  Instructional Arrangements
IEA  Grouping for Instruction
IEB  Organization for Instruction
IEBA  Self-Contained Classrooms
IEBB  Nongraded Schools
IEBC  Departmentalization
IEC  Class Size
IED  Scheduling for Instruction
IEE  Student Schedules
IEF  Team Teaching
IEG  Differentiated Staffing
IEH  Independent Study

IF  Instructional Resources
IFA  Classroom Materials
IFAA  Textbook Selection and Adoption
IFAB  Supplementary Materials Selection and Adoption
IFAC  Equipment and Supplies Selection and Adoption
IFB  Instructional Services
IFBA  Teacher Aides
IFBB  Resource Teachers
IFBC  Instructional Materials Centers
IFBD  School Libraries
IFBDA  Professional Libraries
IFBE  Instructional Television
IFBEA  Closed-Circuit Television
IFBEB  Educational Television
IFBF  Instructional Radio
IFBG  Computer Assisted Instruction
IFC  Community Resources (Cf. KF, MB)
IFCA  Community Resource Guides (Also KFA)
IFCB  Field Trips and Excursions (Also KFB)
IFCC  Use of Community Resource Persons (Also KFC)
IFCD  School Volunteers (Also KFD)

IG  Guidance Program (Also JE)

IH  Academic Achievement (Also JF)
IHA  Grading Systems
IHAA  Final Examinations
IHAB  Report Cards (Also JFAA)
IHB  Homework
IHC  Class Rankings
IHD  Honor Rolls
IHE  Promotion and Retention (Also JFB)
IHEA  Make-Up Opportunities
IHEAA  Tutoring
IHEB  Acceleration
IHF  Graduation Requirements (Cf. JFC)
| II   | Testing Programs (Cf. JGDA)                                      |
| IIA  | Test Selection and Adoption                                    |
| IIB  | Test Administration                                            |
| IIC  | Use and Dissemination of Test Results                          |
| IJ   | Evaluation of Instructional Program (Cf. ICE, MK)              |
| IK   | Miscellaneous                                                 |
| IKA  | Teaching Methods                                               |
| IKB  | Controversial Issues                                          |
| IKC  | Teaching About Religion                                       |
| IKD  | School Ceremonies and Observances                             |
| IKDA | Flag Displays                                                 |
| IKE  | Assemblies                                                    |
| IKF  | School Book Stores                                            |
| IKG  | Book and Science Fairs                                        |
| IKH  | Substitute Teaching                                           |
| IKI  | Lesson Plans                                                  |
# J--STUDENTS

## JA Goals and Objectives

### JAA Equal Educational Opportunities

## JB Attendance

### JBA Compulsory Attendance Ages

### JBB Entrance Age

### JBC School Admissions

#### JBCA Resident Students

#### JBCAA New Resident Students

#### JBCB Nonresident Students

#### JBCBA Tuition (Cf. JS)

#### JBCC Assignment (Cf. AD)

#### JBCCA To Schools

#### JBCCB To Classes

#### JBCD Transfers and Withdrawals

### JBD Absences and Excuses

### JBE Truancy

### JBF Released Time (Also MCB)

### JBG Readmissions

## JC Rights and Responsibilities

### JCA Civil Rights of Minors

#### JCAA Due Process

#### JCAB Interrogations and Searches (Cf. LDAJA)

**SN** *For policy statement regarding interrogations and searches by school officials only.*

### JCB Policies and Rules Development Involvement (Also BDBD, CMAAC)

### JCC Budget Planning Involvement (Also DCCE)

### JCD Conduct (Cf. EDCB, JHCCA)

#### JCDAA Behavior Code

#### JCDAB Smoking

#### JCDAC Alcohol Use

#### JCDAC Drug Use (Cf. IDBB)

### JCDB Dress Code

### JCE Complaints and Grievances

#### JCEA Ombudsman

#### JCEB Hearing Procedure

#### JCEC Demonstrations and Strikes

## JD Discipline

### JDA Corporal Punishment

### JDB Detention

### JDC Probation

### JDD Suspension

### JDE Expulsion
JE  Guidance Program (Also JG)
JEA  Educational Guidance
JEB  Personal Guidance
JEC  Vocational Guidance

JF  Academic Achievement (Also IH)
JFA  Reporting
JFAA  Report Cards (Also IHAB)
JFAB  Student Conferences
JFAC  Parent Conferences
JFB  Promotion and Retention (Also IHE)
JFC  Graduation (Cf. IHF)

JG  Student Welfare
JGA  Student Insurance Programs
JGB  Student Aid Programs
JGC  Student Health Services
JGCA  Physical Examinations
JGB  innoculations
JGCC  Communicable Diseases
JGD  Student Psychological Services
JGDA  Psychological Testing (Cf. II)
JGE  Student Social Services
JGEA  Home Visits
JGF  Student Safety
JGFA  Emergency Drills (Also EBBC; Cf. AFC, LDAK, LDAL)
JGFB  Supervision of Students
JGFC  Dismissal Precautions
JGFD  Student Safety Patrols (Cf. EBBE)
JGFE  Bicycle Use
JGFF  Automobile Use (Cf. EBBE)
JGF  Accidents
JGFGA  First Aid
JGG  Student Transportation
JGGA  Walkers and Riders (Also EDDB)
JGH  School Lunch Service
JGHA  Free Lunches (Also EEA)

JH  Student Activities (Cf. IDE)
JHA  Activities Fees
JHB  Activities Funds Management (Also DK)
JHC  Student Organizations
JHCA  Student Clubs
JHCAA  Secret Societies
JHCB  Student Government
JHCC  Student Publications
JHCCA  Underground Newspapers (Cf. JCD)
JHD  Student Social Events
JHE  Student Performances (Cf. KEAA)

JI  Student Volunteers
JIA  School Service
JIB  Public Service
Employment of Students:
JJ  School Employment
JJA Outside Employment
JJB Work-Study Employment (Cf. IDCF, LEGA)

Solicitations
JK  Solicitations of Students (Also KEBA)
JKA Solicitations by Students (Also KEJB)

Gifts
JL  Student Gifts to Staff Members (Cf. GAJB)
JLA Student Gifts to School
JLB Gifts to Students (Also KHC)

Contests for Students (Also KHB)
JM

Awards and Scholarships (Also KHA)
JN

Student-Community Relations (Also KE)
JO

Student-Staff Relations (Also GAF)
JP

Anomalous Students (Cf. IDD)
JQ

Includes those students for whom special policy
dispensations may or may not have to be made.

Physically Handicapped (Cf. IDDF)
JQA

Mentally Handicapped (Cf. IDDG)
JQB

Perceptually Handicapped (Cf. IDDH)
JQC

Emotionally Disturbed (Cf. IDDI)
JQD

Pregnant
JQE

Married
JQF

Unwed Mothers
JQG

Drop-Outs
JQH

Post-Secondary
JQI

Adult (Cf. IDG)
JQJ

Exchange (Cf. IDCD)
JQK

Foreign
JQKA

Student Records
JR

Types
JRA

Public Use
JRB

Disposition
JRC

Student Fees, Fines, and Charges (JBCBA)
JS

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K--GENERAL PUBLIC RELATIONS

KA  Goals and Objectives
KB  Public Information Program (Cf. FC)
   KBA  Public's Right to Know
   KBB  School-Sponsored Information Media
   KBC  News Media Relations
   KBCA  News Releases
   KCC  Board Meeting Coverage (Cf. BCBJ)
   KCCA  Broadcasting and Taping (Also BCBJB)
   KCCB  Sports and Special Events Coverage
   KBCDA  Press Services
   KBCDB  Broadcasting and Taping
   KBD  Speaker Services
   KBE  Information Campaigns
   KBF  Use of Students
KC  Board-Community Relations
   KCA  Public Participation in Board Meetings (Also BCBI)
   KCB  Community Involvement in Decisionmaking
   KCBAA  Advisory Committees (Also BBF)
   KCBBB  Policies and Rules Development Involvement (Also BDBC, CMAAB)
   KCBCC  Budget Preparation (Also DCCC)
   KCBDD  Facility Expansion (Cf. FDAE)
   KCC  Public Hearings (Also BCAE; Cf. DCDB)
KD  Staff-Community Relations (Also GAH)
   KDA  Staff Participation in Community Activities (Also GAHA)
   KDB  Staff Public Appearances (Also GAHC)
   KDC  Solicitations
   KDCAA  Solicitations by Staff (Also GAIA)
   KDCBB  Solicitations of Staff (Also GAIB)
KE  Student-Community Relations (Also JO)
   KEA  Community Activities and Performances
   KEA  By Students (Cf. JHE)
   KEAB  For Students
   KEB  Solicitations
   KEBA  Solicitations of Students (Also JKA)
   KEBB  Solicitations by Students (Also JKB)
   KEC  Interviews with Students
KF  Community Instructional Resources (Cf. IFC, MB)
   KFA  Community Resource Guides (Also IFCA)
   KFB  Field Trips and Excursions (Also IFCB)
   KFC  Use of Community Resource Persons (Also IFCC)
   KFD  School Volunteers (Also IFCD)
Use of School Facilities (Cf. DFG)

Buildings and Grounds

Equipment

Services

Public Gifts

Awards and Scholarships (Also JN)

Contests for Students (Also JM)

Gifts to Students (Also JLC)

Gifts to Staff Members (Cf. GAJB)

Gifts to Schools

Free Materials Distribution in Schools

Political Campaign Materials

Special Interest Materials

Advertising in the Schools

Includes advertising in school publications, on school property, and sponsored advertising of school events.

Public Sales on School Property

Public Use of School Records (Cf. EFDC)

Visitors to the Schools

Complaints

About School Policies

About Curriculum

Instructional Materials

About School Facilities and Services

About School Personnel
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<td>Work-Study Programs (Also IDCF; Cf. JJC)</td>
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M--RELATIONS WITH OTHER EDUCATION AGENCIES

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<td>Private Schools Relations</td>
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<td>Shared Services</td>
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<td>Education Research and Service Centers (Cf. ICC)</td>
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<td>Title III Centers</td>
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<td>Advanced College Placement (Also IDCE)</td>
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<td>School Boards Associations (Also BGA, BGB, BGC)</td>
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<td>State Education Agency Relations (Cf. EFDA)</td>
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<td>Educational Accreditation Agency Relations (Cf. IJ)</td>
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<td>ML</td>
<td>Professional Visitors and Observers</td>
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APPENDIX III

Sample School Board Policy Statement Coded to the Taxonomy

EQUAL EDUCATIONAL OPPORTUNITIES

The policy of the State of Washington for education is stated in Article IX of the Constitution. Its preamble reads: "It is the paramount duty of the State to make ample provision for the education of all children residing within its borders, without distinction or preference on account of race, color, caste, or sex."

Port Angeles School District has been created by the legislature to execute the educational policy as defined in the Constitution. It shall be the policy of the Port Angeles School District to offer a quality of education which provides all children with the necessary skills and attitudes, commensurate with their ability, to become effective citizens able to take their places in the community, the state, and the nation. This education shall be provided under a policy which is consistent with the provisions of the Constitution of the State of Washington, the laws of the State Legislature, the laws of the United States, and policies and regulations established by the Board of Directors of Port Angeles School District.

SOURCE: School District #21, Port Angeles, Wash.
DATE: 11/13/67
Sample Administrative Rule Statement Coded to the Taxonomy

STAFF INVOLVEMENT IN RULES DRAFTING

To the end that joint advice may be readily available, the staff shall be encouraged to elect advisory committees to work with principals and the Superintendent in the areas of concern to the staff. Furthermore, the Superintendent and principals shall at their own discretion appoint additional committees for such functions as are not being performed by existing groups.

Each selected staff committee shall act in an advisory capacity to the administrative officer responsible for the area in which the committee was elected to operate. Each appointed committee shall act in an advisory capacity to the administrative officer by whom it was appointed.

SOURCE: School District #5, Aberdeen, Wash.

DATE: 1/63
APPENDIX V

Sample Information Statement Coded to the Taxonomy

STUDENT RIGHTS AND RESPONSIBILITIES

The National Education Association believes that genuine student involvement requires responsible student action which is possible if students are guaranteed certain basic rights, among which are the following: the right to free inquiry and expression; the right to due process; the right to freedom of association; the right to freedom of peaceful assembly and petition; the right to participate in the governance of the school, college, and university; the right to freedom from discrimination; and the right to equal educational opportunity.

APPENDIX VI


B—SCHOOL BOARD OPERATIONS

Background Comment. Section B provides the repository for statements about the board as a board. The board here is "ruling on itself." It is delineating its own practices, its own procedures. It is setting forth its own ground-rules for the conduct of meetings and for the ethical behavior of its members.

But Section B policies reach beyond internal matters. Its statements also set forth guidelines concerning some of the board's closest relationships—with its chief executive, the superintendent of schools; its attorney; its advisory committees and consultants; the press; and—in the area of policy development—with staff, students, and public. It is because of these interrelationships that Section B has so many cross references.

Because the board is ruling on itself, some of the statements in this section will be highly specific. Some will employ the language of rules. The policy for BCBA—Time and Place of Meetings, for example, will undoubtedly be highly specific in wording. Such statements will still be policies, of course, and not administrative rules.

Also, despite the fact that the board is ruling on itself, there are categories in this section that do admit discretionary action by the superintendent and will consequently call for the development of companion rules by the superintendent. For example, administrative rules, rather than board policies, are probably the best instruments for spelling out the board's intent concerning staff, student, and public involvement in the policy drafting process. (See the BDB sequence.)

The Categories

BA—Goals and Objectives
See separate discussion of Goals and Objectives, page 38.

BB—Internal Organization
Use this category and whatever subcategories as necessary for statements concerning the organization of the board; the duties of its officers, members, and committees; and the relationship of the board to its professional and lay advisors.

Note subcategory BBAA—Method of Election. This descriptor refers, in context, to the board's method of electing its own officers, not to the public election of board members. (See ABCD.)

Note subcategories BBBBB—New Member Orientation and BBBC—Board Member Development Opportunities. Both reflect the importance of a planned program for educating board members about their roles as educational leaders in contemporary society and might express the endorsement of member participation in regional, state, and national meetings designed specifically to develop school leadership talent. They might also express the board's intention to provide professional periodicals—like The American School Board Journal—to its members as a stimulus to growth.

Note subcategory BBF—Advisory Committees. The subordinate descriptors here specify structure and groundrules that are designed to keep the board in ultimate control of the advisory committee relationship.

Do not confuse BBF—Advisory Committees with CL—Councils, Cabinets, and Committees. The former are lay and/or professional bodies created by the board