



How to Use Your NMSBA Prepared Policy Manual

“update it and maintain it
to improve governance”

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1

NMSBA Policy Services

- **Policies** establish the framework of what is to be done.
Statements that describe what the *Governing Boards* expects and requires. Once created, they continue in perpetuity as written until revised or rescinded.
- **Regulations** describe how policies will be implemented.
***Administrative* documents that tell how the policies are going to be put into action. Since they explain how the Superintendent intends to accomplish policy expectations and requirements they are subject to change whenever the Superintendent alters the procedure(s).**
- **Exhibits** are informational items.
Documents that either give or request *information*. Exhibits are the most volatile of the documents as they are more frequently modified to accommodate ongoing changes and needs for presenting or gathering information.

2

Codification System

- The newer system, NEPN, is indexed with an alphabetical system and an alpha and four digit system in tandem. (e.g., D-2450 and DJ).
- ✓ Policy documents are at divisions of 50 (i.e., 50, 100, 150, etc.)
- ✓ Regulations begin 11 numbers after policy document (i.e., 61, 111, 161, etc.)
- ✓ Exhibits begin 31 numbers after policy document (i.e., 81, 131, 181, etc.)
- ✓ Relocates some documents to more appropriate section in manual.
- ✓ Allows space for indexing new documents

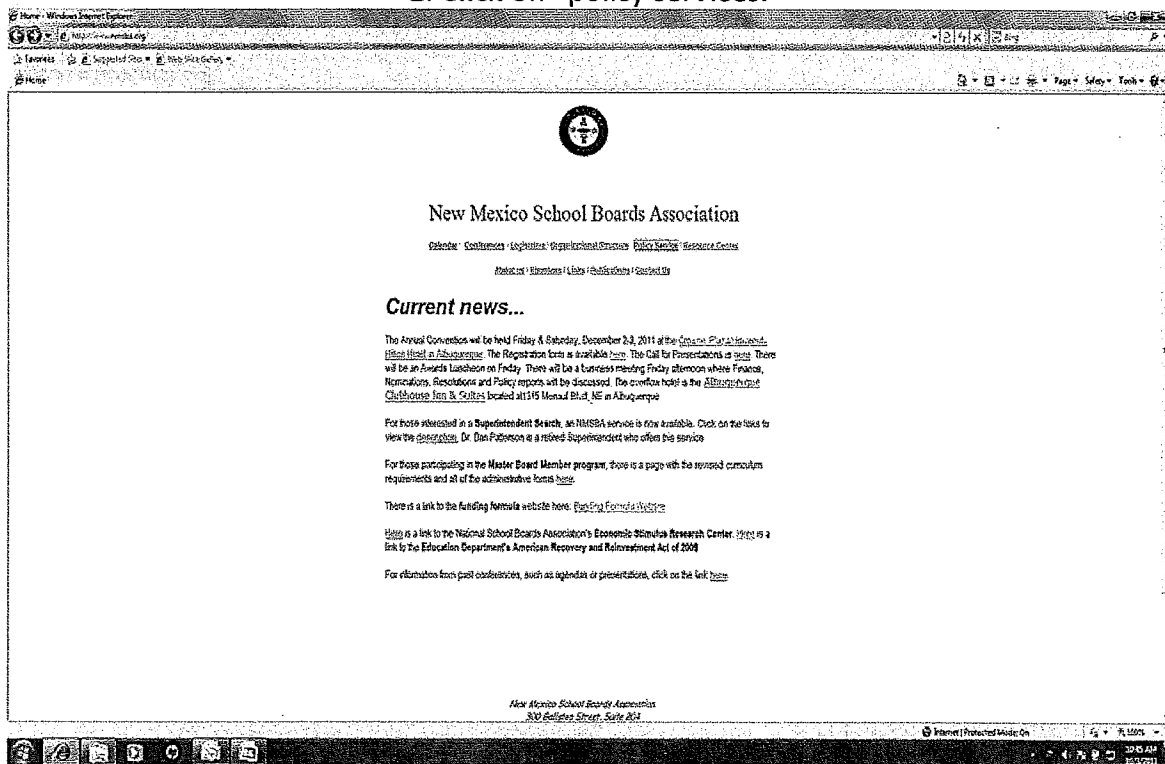
3

Ownership

- The Policies and Regulations are those of the District—not *NMSBA*.
- Models have been researched, drafted, and updated to assist the District in complying with the laws and regulations affecting school districts. *Policy Services* will advise the District on the potential effect and advisability of deviating from the model documents. However, it is the District's prerogative and responsibility to modify and adopt policies and regulations the Board and administration believe best meet the needs of the District.
- The *NMSBA* copyright may be removed from any document about which *Policy Services* has a concern or for which *Policy Services* has not performed a thorough assessment of its compliance with applicable laws, rules, and regulations.
- *Policy Services* controls the titles, indexing, codification, and format of documents to retain consistency with the NEPN system which is important for the search and retrieval of policy information.

4

1. Go to NMSBA's website, <www.nmsba.org>.
2. Click on "policy services."



The screenshot shows a web browser window displaying the homepage of the New Mexico School Boards Association (NMSBA). The browser's address bar shows the URL "http://www.nmsba.org". The page features the NMSBA logo at the top center, followed by the organization's name. Below the name is a navigation menu with links for "Calendar", "Conferences", "Registration", "Organizational Structure", "Policy Services", and "Resource Center". A secondary menu includes "About Us", "Members", "Links", "Publications", and "Contact Us". The main content area is titled "Current news..." and contains several paragraphs of text with hyperlinks. The text discusses the Annual Conventions (December 2-3, 2011), the Registration form, the Awards Luncheon, the Executive Meeting, the Albuquerque Clubhouse, the Superintendent Search, the Master Board Member program, the funding formula website, the Economic Stimulus Research Center, and the American Recovery and Reinvestment Act of 2009. The footer of the page provides the address: "New Mexico School Boards Association, 300 Gallatin Street, Suite 201". The browser's taskbar at the bottom shows the system tray with the date and time set to 3:45 AM on 10/27/2011.

New Mexico School Boards Association
300 Gallatin Street, Suite 201

Internet Protected Mode: On

3:45 AM
10/27/2011

Click on "Go to Policy Services portal"

The screenshot shows a web browser window displaying the New Mexico School Boards Association website. The browser's address bar shows the URL: <http://www.nmsba.org>. The website header includes the NMSBA logo and the text "New Mexico School Boards Association" and "Celebrating 100 years of Service to New Mexico's School Boards".

New Mexico Policy Services – The Service for you.

The program provides enhanced policy services on a four-year subscription basis required by a bonded New Mexico Attorney with 11-year policy-writing experience.

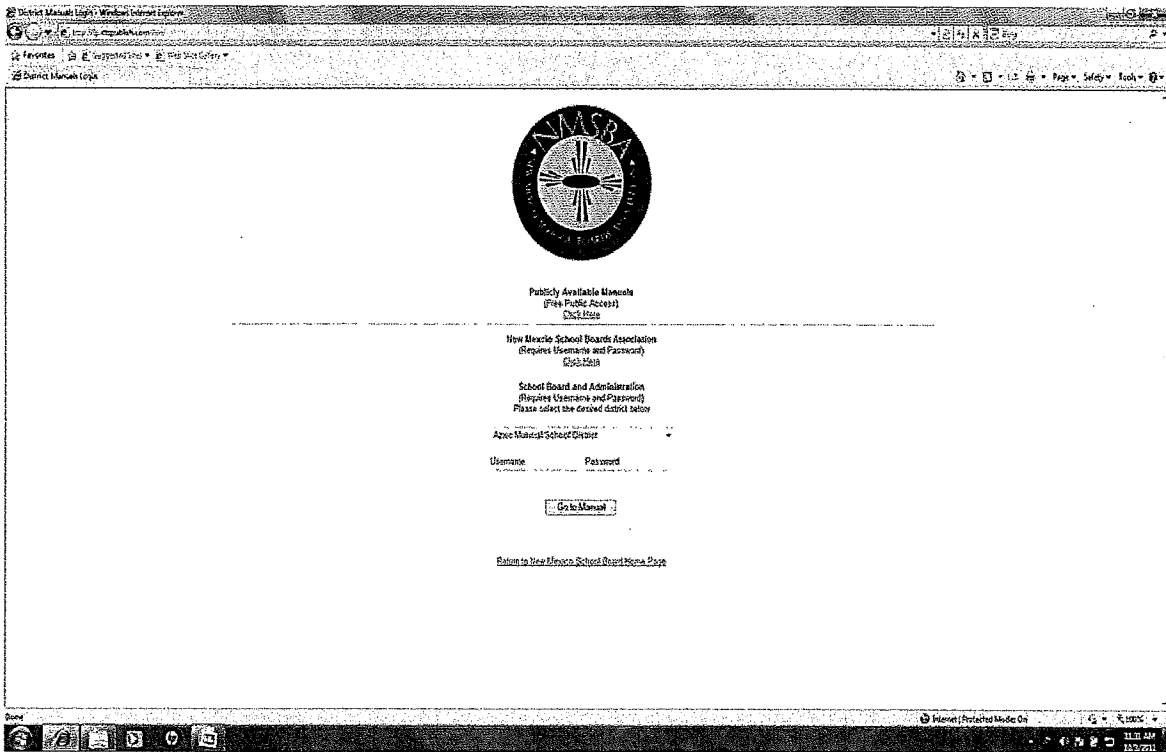
Policies are updated periodically as changes in statutory law, state law, state agency rules and regulations, Attorney General Opinions, and local conditions in a district occur.

Features of the Policy Services Program include:

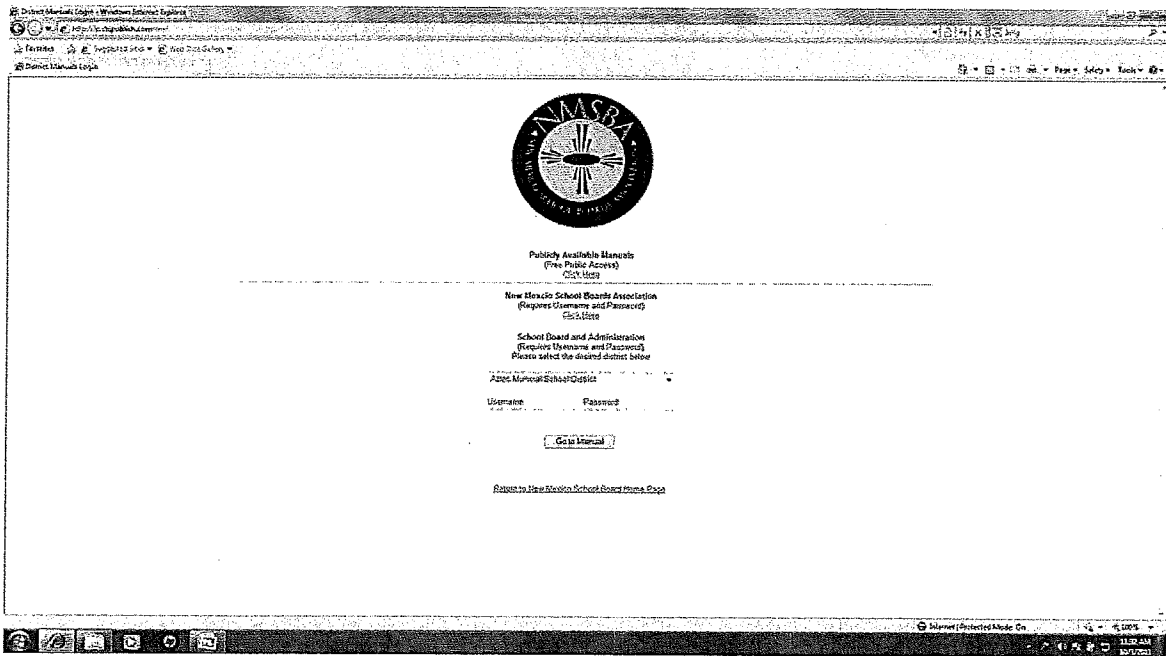
- A national system for coding and writing policy developed by the National School Boards Association.
- Call or e-mail to discuss policy related issues and possible revisions. With appropriate topic-related information, Policy Services will write personalized policy for the District.
- Forward Internet access to the District Policy Manual for the public and staff using browser commonly available on computers.
- The assistance provided by the Policy Services Program reduces the amount of time devoted to review and dissemination of state and federal compliance issues.
- Expeditious access to related policy available at any internet connected computer.
- Administrators have legal opinions and updated procedures at their fingertips.
- The Supplemental will provide all the funding and interpreting by the organization.
- The Supplemental services for the contractor to determine and clearly information in need of referral to legal counsel, including legal opinions.
- The Counsel is secure and content to be shared without proper dissemination.
- Costs and savings.
- The monthly cost is \$25, approximately the monthly cost of a new employee's fringe benefits package.
- The District is responsible for which expenses and negotiations:
 - Travel, lodging, food and the preparation of the draft copies
 - Expenses generally cost from \$700 to about \$1000 depending on travel
 - Expenses in a flat \$1,200 for up to 10 draft copies and a final copy of the policy manual
 - Final hard copy may be purchased in a year covered three ring binder with dividers, index and color folder index for \$15 per two volume set.
 - Contact: Sue Cullen (505) 253-5564, or e-mail: scullen@nmsba.org or Diane Williams (505) 464-0122 for e-mail and telephone contact.

New Mexico School Boards Association
800 Jackson Street, Suite 204

Choose "Publicly Available Manuals" to access manuals to which the respective districts have granted public accessibility.



To enter an online manual that includes activated hyperlinks to legal references, cross references, and so forth, in the **"School Board and Administration"** section, scroll to the district's name, enter the username and password, then click the **Go To Manual** button.



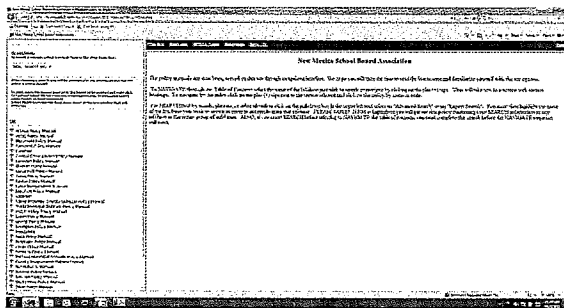
The following exhibits demonstrate how to apply the various search features once the manual is opened.

Using Section Headings and Table of Contents

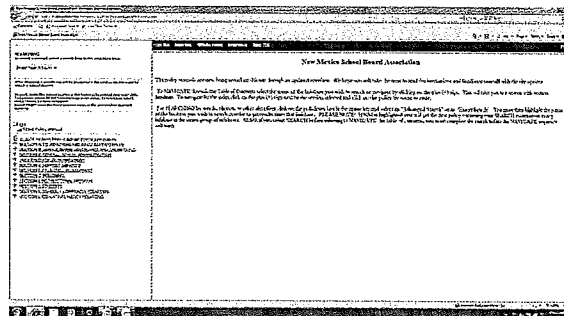
To utilize the section heading and table of contents to locate a particular document:

- (1) click on the red cross adjacent to the selected district;
- (2) click on the red cross to the left of the selected section to open that section;

1



2

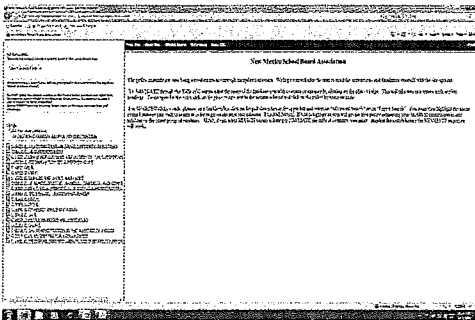


Using Section Headings and Table of Contents (cont.)

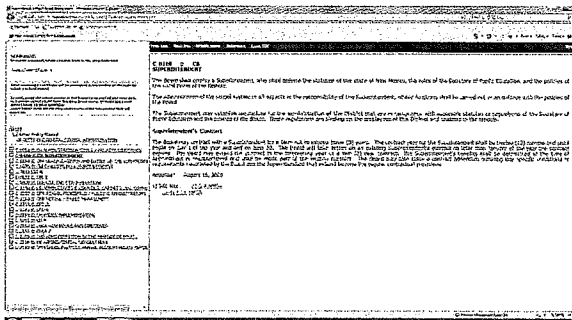
(3) To view a specific document, click on the index/ code/name of the particular document;

(4) The chosen document opens.

3.



4.



Notes: When entering a manual via the "School Board and Administration" option, the initial screen opens in the selected district manual. click on the red cross before the district name and proceed at step 2 above.



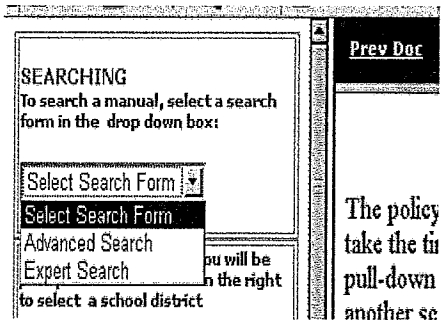
Content window actions: Prev Doc - to preceding manual document; Next Doc - next document; Return to ASBA Home Page - to ASBA web site; Prev Hit - returns to previous hit when using a "query" search; Next Hit - advances to next hit when using a "query" search; Reference - opens a window identifying the name of the document in the content window; Sync TOC - highlights document information in left frame Table Of Contents window (may need to scroll to locate)

Note that we are using examples other than New Mexico Districts

- The examples are essentially the same as those in NM District manuals
- When doing an advanced or expert search check the left column to make sure
- The district name you wish to search is highlighted. The search will be of the manual name highlighted

Using "Queries" to Search

The Search Forms enable the user to find information by specifying a word, phrase, character or number to be located. Although a search form can be activated before a district is selected, the recommended procedure is to click the red cross before the district name prior to choosing a search form.



The two available search forms are:

- Advanced Search
- Expert Search

The policy take the ti pull-down another se

Advanced Search form

Expert Search form

Instructions to search a manual:
 For example, if I wanted to search the "Sowilo Policy Man Manual" to the LEFT (in the frame on the left). This would look like the picture below. After you have selected the text of your search (query) in the appropriate boxes below:

- + Benson Policy Manual
- + Bicentennial Policy Manual
- + Bowtie Policy Manual
- + Bullhead City Policy Manual
- + Campo Verde Policy Manual

Search for documents...

containing all these words:

not containing any of these words:

containing one or more of these words:

containing this exact phrase:

containing these words near each other:

Find alternate word forms (stemming)

Find synonyms (thesaurus)

Show context in the search results list: Off On

Search Cancel

5 words
10 words
15 words
20 words

Query terms:

Show context in the search results list: Off On

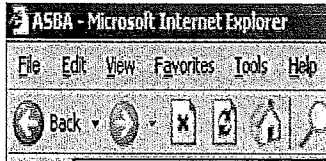
Search: "Canal" 5 words
10 words
15 words
20 words

Search (Query) Syntax Summary

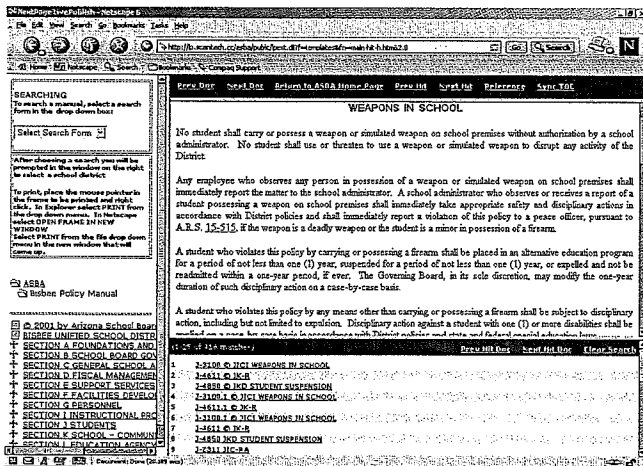
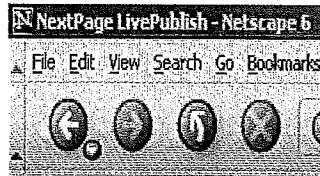
Operator	Example	Result
And	one two one & two one and two	Finds documents with both 'one' and 'two'.
Or	me you me or you	Finds documents with either 'me' or 'you'.
Not	"Not notch	Finds documents that don't contain 'not'.
Exclude or	apples - oranges apples xor oranges	Finds documents with either 'apples' or 'oranges', but not both.
Phrase	"to be or not"	Finds documents with the exact phrase 'to be or not'.
Single character	wom?n	Finds documents with 'woman', 'woman', etc. or 'his', 'his', 'them', etc.
Wildcard character	*n *n*	Finds documents with any 'addres*', 'assign', etc. or 'word', 'word?', 'wording', etc.
Ordered proximity	"corporate tax law"/10	Finds documents with 'corporate', 'tax' and 'law' within 10 words, in the order given.
Unordered proximity	"technical resume acquires" /5	Finds documents with 'technical', 'resume' and 'acquisition' within 5 words, in any order.
Stemmed word form	run%	Finds documents with 'run', 'ran', 'runs', and 'running'.
Synonym	!alert\$	Finds documents with 'alert', 'active', 'aware', 'quick', etc.

Either search form may be used; practice with both will help the user determine which one is best for the intended purpose. A return from the selected form to the alternate form may be facilitated by using the browser's Back button.

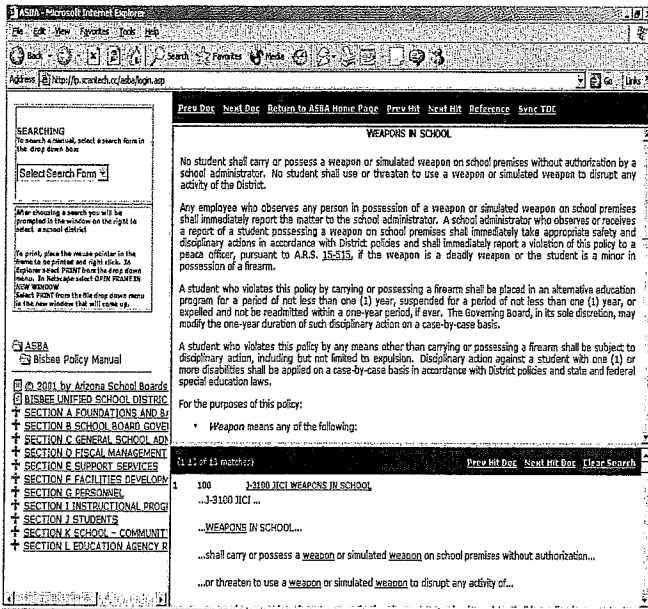
Internet Explorer browser



Netscape browser



Conducting a search when leaving the "Show context in the search results list" turned OFF produces an upper right frame displaying the document content to correspond with the document selected in the lower right frame.



Conducting a search when specifying the number of words (5, 10, 15, or 20) for the “Show context in the search results list” expands the display to show the document context in which the search item appears.

Printing

In the “Internet Explorer” browser, place the cursor in the content window and choose PRINT in the pull down menu. In the “Netscape” browser, place the cursor in the content window, RIGHT CLICK, select “Open frame in new window”, then choose PRINT in the pull down menu.

ATTENTION! Special information for

«District»

Client school systems that subscribe to NMSBA's Policy Services now have improved access for searching and reading the online policy manuals that are maintained by NMSBA.

A More User-friendly Online Manual. The format not only continues the capability to search by words, phrases, numbers, codes, et cetera, but also includes additional functionality that uses plus sign expansion that enables the user to view the manual's table of contents and select documents by name. A direct connection can be made at <<http://lp.ctspublish.com/nm/>>.

When the District has so granted, staff members and the public may access the District's documents online in the Publicly Available Manuals area of the web site without using a password.

Administrators and Board Members also have access to a copy of the manual containing interactive links to the legal references, rules, and attorney general opinions at the School Board and Administration section. Access to this area is limited to the District's administrators and Governing Board members and requires the user to enter the username and the password, which are provided to the Superintendent.

Username newmex01 Password X000NMA

Security

Caution should be exercised in dissemination and use of the above password to avoid compromising the security of the District's policy manual infobase.

15

Subject: NMSBA Additional Services

The New Mexico School Boards Association Policy Services (NMSBAPS) has prepared an addition to the Policy Services which will permit access to and searching of a District's policy manual from any computer. The newest addition to the service is a USB drive with a self contained search engine and policy manual which has three purposes:

- It will provide independence from an internet service.
- It will allow copying of any currently adopted policy into a word formatted document for printing or modification.
- It can be maintained and updated from an online source with the latest policies adopted by the district.

16

NMSBA Additional Services (continued)

- ***NMSBA has provided the initial unit free of any cost or maintenance fees as a service to the persons maintaining policy in the subscribing districts.***

Additional units for the use of Board Members or Administrators may be purchased at a one-time cost of \$25 each. If additional units are purchased, a monthly maintenance fee of no more than \$15 will be added to the district service agreement regardless of the number of units purchased.

- User instructions are provided with the drive. The instructions are similar to those for the on line manual.

17

Updating and maintaining a manual

- **What are Advisories and Alerts**
 - An advisory is an explanation of a policy change containing both a sample policy based on an NMSBA Policy Services Model Policy and the law on which it is based.
 - An Alert is an explanation of some issue that has caused a concern which may or may not require a policy change in the future.

18

Updating and Maintaining a Manual

(continued)

- When an Advisory or Alert is received:
 - Bring the information to the attention of the Board
 - Review the material for possible local policy implications
 - The Advisory material is prepared in the form of a model that can be adopted as is with little or no change
 - Upon adoption send the adoption date and any changes to Policy Services

19

Updating and Maintaining a Manual

(continued)

- Send the policy changes with the wording intended.
 - Strike through to remove words from the model
 - Underline words added to the model
 - If you change the intent of the policy call policy services before final adoption to discuss the change

Policy models are crafted to cover the issue and give the Board necessary control

20

Additional Service (continued)

- **The access has been sent to you in the form of a brown USB drive with NMSBA printed in gold across the side.** This improvement in your service is intended to be used by the Administrative Assistant or administrator who is responsible for providing the Board adopted policies to NMSBAPS for final typing and printing.

21

Coming Policy Changes

- Tax free use of cell phones for Business purposes
 - Internal Revenue Service (IRS) Notice 2011-72 addresses the tax treatment of employer-provided cell phones. It states that when an employer provides an employee with a cell phone primarily for non-compensatory business reasons, the business and personal use of the cell phone is generally nontaxable to the employee.

22

Coming Policy Changes (continued)

- **Internet Safety Policy**

- School districts that receive E-rate funds must adopt specific internet filtering and policy requirements per the Children’s Internet Protection Act (CIPA).
- This new requirement is effective on July 1, 2012.

23

Coming Policy Changes (continued)

The Environmental Protection Agency (EPA) developed a list of potential violations of federal EPA regulations to remind K-12 schools of several key environmental requirements.

Among these are:

- Failure to post warning labels in routine maintenance areas (e.g., boiler rooms)
- Failure to apply pesticides in accordance with label instructions.
- Failure to annually file a Tier 2 chemical inventory information form under the Emergency Planning and Community Right to Know Act (EPCRA) for Storage tanks

24

Questions and Demonstration

- Using the online service, the presenter will find policies and procedures suggested by the audience to demonstrate the power of the search engine and the comprehensive nature of the NMSBA Policy Services prepared Policy Manual.