

GOAL ACADEMY POLICY
Formulation and Issuance of Board Policies

Section: B- - School Board Governance and Operations

Policy Number: B-2

Policy Name: Formulation and Issuance of Board Policies

Approval Authority: Board of Directors

Responsible Executive: Chief Business Operations Officer

Responsible Office: **Business Operations**

Originally Issued: 7/27/2010

Revisions: 2/20/2011, 6/21/2016, 2/27/18

1. Policy Statement

GOAL Academy, formally approves, promulgates in a consistent format, and centrally maintains all official board policies. People responsible for writing, updating, and distributing school policies must comply with the conditions and procedures that are outlined in this document, which defines a school policy, explains the standardized policy format, outlines the steps for formulating, approving, issuing, and amending policies and procedures, and describes the roles of the approval authority, responsible executive (defined below), and responsible office (defined below).

2. Reason for Policy

Board policies must be kept current, and made available electronically to all relevant operating units in a timely manner, to assure compliance with policy objectives and to establish the accountability of operating units and individuals affected by each policy.

3. Who Should Read This Policy

- Board members
- Chief Officers
- Directors, and department heads
- Coordinators
- School office staff
- Individuals considering issuing or revising a school policy

4. Related Documents

GOAL Academy Policy Template

5. Contacts

Chief Business Operations Officer

6. The Policy

I. Board Policy

A. Definition: A board policy is defined by *all* of the following criteria:

- It has broad application throughout the school.
- It helps ensure compliance with applicable laws and regulations, promotes operational efficiencies, enhances the school's mission, or reduces institutional risks.
- It mandates actions or constraints and contains specific procedures for compliance, and articulates desired outcomes.
- The subject matter requires school board approval.

All policies that meet the above criteria should be included in the electronic board policy library, found on the school website, and are governed by this policy.

B. Department Policies and Procedures

Many other important school or local operating unit checklists, procedures, and guidelines do not meet all of the above criteria. They are not considered to be Board policies and are not governed by this document. However, these departmental policies and procedures should be clearly written, well communicated, and easily accessible to staff members. Department policies should be developed to implement board policy and are designed to increase the probability of an effective and efficient school system.

C. Outdated Policy

Many policies adopted pursuant to the process set forth in this document are outdated or are no longer applicable to the functioning and operations of the school. In these cases, outdated policies will be revised. Policies no longer applicable will be rescinded and so noted in the electronic document repository.

D. Policy Versus Operating Procedures

For those who merely need to know the school's policy on a given question, the "Policy Statement" and the "Reason for Policy" on the first page of each document can easily be excerpted. However, the official versions of school policies will also include operating procedures. Policies are available on GOAL's website at (<https://goalac>)

II. Formulating and Approving a Board Policy

The need for new Board policies and procedures may arise anywhere, but every policy must fall within the jurisdiction of a responsible executive. The responsible executive takes charge of contacting the Chief Business Operations Officer to begin the formulation process.

A. New Policy Process

The responsible executive will designate a responsible office, which is listed in the template of the written policy document. The responsible office will generally be the office that develops the policy and procedures, and will be accountable for the accurate formulation, issuance, and timely updating of the document.

Procedures: Under the direction of the responsible executive, an individual from the responsible office who wishes to propose a new policy must:

1. Draft a policy statement, a reason for policy, and an impact statement that describes the need and justification for, as well as the impact of, any newly proposed school policy.
2. Obtain guidance from the Chief Business Operations Officer, as to appropriate review processes, including input from chief officers.
3. Establish a policy committee to formulate the entire document using the standard policy template format. The purpose of the policy committee is to assure that each policy, along with its procedures, is clearly written using the standard format, is easily understandable to all who must comply with it, and is practical and applicable. The policy committee should consist of appropriate individuals who can provide a broad perspective on the content and application of the policy.
4. Members of the policy committee may choose to contact the Chief Business Operations Officer for guidance and assistance at any time during the editorial process. The responsible office should arrange for the appropriate Coordinators and Directors and Chief Officers to review the policy during the editorial process.
5. When the policy committee has finished its work on a particular policy and procedures, the draft policy is presented to the responsible executive.
6. The responsible chief officer will distribute the document to the approval authority, where the chief officer secures final approval, prior to issuance to the school community. If the policy requires Board approval, the policy will be brought forward to the Board through the appropriate channels and via the Executive Director for action. This process will be guided by the Chief Business Operations Officer. New Board Policies will have a first reading, and can be adopted following a second reading.

Note: Concurrent with the process described above, existing school policies that are not yet in the standard template format will be placed into this format, utilizing the procedures contained herein.

III. Standard Policy Template

To ensure consistency, a standard format for policies was created. Use of the standard format facilitates the adoption of clear, concise policies and procedures at all levels of school organization. The official policy template is available as a word document; please contact the Chief Business Operations Officer.

IV. Interim Policies

Responsible chief officers are empowered to issue interim policies, with the agreement of the approval authority, through the Chief Business Operations Officer in situations where a school policy must be established in a time period too short to permit the completion of the process delineated in this policy. Each interim policy will include only the policy statement and reason for policy, and may remain in force up to two months from the date of issuance. They may be extended as necessary. To issue an interim policy, contact the Chief Business Operations Officer, which, after putting the document through an initial review, will issue the policy in the official policy format.

V. Issuing a Policy

The Chief Business Operations Officer, or other appropriate office, will make a school wide announcement of the availability of the policy and procedures on the school's website. The announcement will include a brief explanation of the policy, the responsible office, and how to access the policy.

VI. Amending a Policy

From time to time, policies and procedures will need to be amended or updated. The responsible office is charged with keeping a policy up to date. Policies should be periodically reviewed and the need for amendment assessed. A detailed review should occur at least once every one to three years depending on the nature and content of the policy.

When changes are necessary to a school policy, the responsible office should contact the Chief Business Operations Officer to determine whether the changes require a full review and formal approval of the designated approval authority or if the modifications are minor clarifications that can be posted immediately. Minor clarifications would include updating employee titles or similar updates. Amendments to policies that change the intent or practice of the policy would need the approval of the designated authority, but are not subject to multiple readings prior to approval.

VII. Responsibilities

The major responsibilities each party has in connection with Board Policy B--2, Formulation and Issuance of School Policies, are as follows:

Approval Authority: The board is responsible for final approval of a new or revised policy or regulation.

Responsible Executive: The Executive Director charges this individual with the responsibility to oversee development of school policies and revision of existing policies as required in his or her area of jurisdiction and to ensure that appropriate school constituents will be consulted during these processes. This executive also will designate a responsible office as explained below. Implementation of policy will be delegated to the appropriate chief officer(s)).

Responsible Office: Under the direction of the Responsible Executive, and in collaboration with the various school constituents, the responsible office will develop a particular policy and procedures and will be accountable for the accuracy of its subject matter, its issuance, and timely updating. This office also will be responsible to ensure that procedures and guidelines necessary to carry out the policy are current and available.

Chief Business Operations Officer: This person will be responsible to:

- Work with the responsible office to formulate policies and procedures
- Make school wide announcements on the availability of a school policy
- Promulgate, maintain, update, and archive all standardized school policies and procedures, based on input from the Responsible Executive and/or Responsible Office