



July 24, 2023

Mr. Eric Whipple
Superintendent of Schools
Charlotte Valley Central School District
15611 State Highway 23
Davenport, New York 13750

Dear Mr. Whipple:

It was a pleasure to speak with you last week regarding the possible development of a new comprehensive Policy Manual for the Charlotte Valley CSD. Per our discussion, enclosed is a proposal for the development of a new Policy Manual for your district. For the 2023-24 school year, the cost of the Policy Manual is \$9,400, inclusive of all services and final product provided during the contract time and is BOCES-aidable. The cost and manual process is usually extended over a two-year fiscal period of \$4,700 per year. In addition, the Monthly Policy Updates and our Policy Pulse Newsletter are complimentary while you are in the process of developing the new Policy Manual.

Upon completion of the Policy Manual, Policy Services offers three different levels of service to assist districts in keeping the manual up-to-date. Ideally, upon completion of the new Policy Manual, if a district were to select Level 2 or Level 3, the manual could be kept up-to-date indefinitely and not need a repeat of this major overhaul process again for numerous years. In addition, many districts continue with the development of the Administrative Manual upon completion of the Policy Manual. Please refer to the enclosed chart for a summary of this process and the various options. Policy Services also offers the option to assist with the upload and maintenance of the new Policy Manual within BoardDocs. However, final decisions about these options do not need to be made until we are approaching the completion of the new Policy Manual.

Please do not hesitate to contact me at 716-821-7084 or jhallgren@e1b.org if you have any additional questions. We look forward to possibility of working with you and the Charlotte Valley CSD on this project.

Sincerely yours,

Janell Hallgren

Janell Hallgren
Manager of Policy Services

Enclosures

POLICY SERVICES

Policy Manual Proposal for the Charlotte Valley CSD July 24, 2023

work collaboratively with the Charlotte Valley CSD to develop a new comprehensive Board Policy Manual in compliance with federal and state laws, regulations, court and Commissioner's decisions and to reflect the culture and practices of the community and district. Following the development of the Policy Manual, the District may choose to pursue the development of a new Administrative (Regulation) Manual.

Erie 1 BOCES strives to develop a Policy Manual that puts a District in a proactive stance as it relates to school issues. In addition, your Policy Manual will:

- ◆ Provide an infrastructure of governance for the School
- ◆ Organize and clarify School information
- ◆ Provide an orientation tool for new Board members
- ◆ Communicate to the school and community the Board's governance positions
- ◆ Provide the foundation and parameters for administrative implementation
- ◆ Increase the probability that Board's decisions will be objective and consistent

Background:

Erie 1 BOCES Policy Services has provided policy development and complementary services to school districts and BOCES for over 35 years. We are currently serving almost 400 New York State districts, including Central, Union Free, City and Charter Schools.

Staff:

As the Manager of Policy Services, I oversee two Senior Policy Coordinators, four Policy Coordinators and four clerical staff, who are fully dedicated to the department. Our Policy Staff members have a vast array of educational experience, including backgrounds in law, business, special education, English, counseling and public policy. In addition, three of our Coordinators are attorneys with various legal backgrounds.

Process:

Once the commitment for the project has been received, a Policy Coordinator will contact a designated representative to collect the appropriate materials. A First Draft Questionnaire will be sent to the school to obtain demographic data to be used to customize the new first draft Policy Manual. Documents such as any current policies, and other documents such as, a few Board meeting minutes, the Organizational Meeting

minutes, the Code of Conduct, etc. may also be reviewed. From these documents, a first draft of the Policy Manual will be developed. As discussed, your current policies will be reviewed. Depending on their age and status, some of the current policies may be incorporated into the new 1st Draft Policy Manual. Your new 1st draft will contain all of our sample policies applicable to your school and allow you the opportunity to review, edit, and delete as required to customize the manual to your unique needs and circumstances.

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An electronic version of the draft is presented to the administration and/or Policy Committee to assure accuracy (a limited number of CDs, flash drives and/ or paper copies are also available if necessary). After the initial review and revision by the district, Policy Services will process your initial revisions and update the draft with any changes based on law or regulation, as well as add new policies that may have been developed since the development of the first draft. At this stage, copies of the second draft are presented to the Board of Education for review, revision, and final adoption. Once the manual is adopted, a limited number of copies are printed on "Policy" paper and placed in high-quality binders. In addition, final copies will be available on CDs, or flash drives, and electronically via email. Many districts, including Erie 1 BOCES <www.e1b.org>, are placing their manuals on their district website or within BoardDocs. Expanded detail of this process and guidance will be provided to the District along with the first draft of the new Policy Manual.

Organization:

The Policy Manual will be organized into 8 sections, representing the spectrum of issues relating to school governance:

- 1000 – By Laws
- 2000 – Board Operations
- 3000 – Community Relations
- 4000 – Administration
- 5000 – Business/Non-Instructional Operations
- 6000 – Personnel
- 7000 – Students
- 8000 – Instruction

Legal Compliance:

Many of our policies and regulations are standardized samples that we make every effort to keep in legal compliance with law and regulation. It is the responsibility of the District to assist us in customizing the policies to match the culture, practice and procedures of the district. While we do have staff members with legal backgrounds, we do not work in the capacity of your school attorneys. Some school districts may elect to have their own school attorney review all policies as they are adopted or revised. Many Districts consult with their school attorney only on policies of particular significance or if there is a specific legal question, but do not have the attorneys review the entire manual. The extent of the involvement of the school attorney is a decision that each district must make individually.

If at any time throughout the process, the District Administration, the Board of Education, or the Policy Committee has a question about a particular policy or suggested revision, our staff would review, research the issue, and provide sample language as appropriate. However, if the issue is beyond the scope of our legal ability, we would suggest that you consult with its school attorney.

Cost:

As of 2023-24, the cost of the development of a comprehensive Policy Manual is \$9,400 and is usually split over two fiscal years (\$4,700 each/year for 2 years). There are no hidden costs; all elements of the development process including consultations, multiple revisions, and final copies are included in this price. If additional time is required to complete the development of the Policy Manual, an Extension may be provided for \$2,600 per additional year.

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Follow-Up Services:

There are several options available through Policy Services to assist Districts in keeping their Policy Manuals current and provide appropriate implementation of their policies:

Monthly Policy Updates (Level 1): Policy Updates are publications provided monthly via SharePoint to provide various information on important policy topics, which includes new sample policies when applicable. This service also affords the district the ability to contact Erie 1 BOCES for sample policies on other topics. For 2023-24, the cost is \$725/year.

Quarterly Policy Revisions and Policy Updates (Level 2): This service provides districts with Policy Updates (see above) along with a quarterly summary of comprehensive revisions to existing policies. Revised policies will be included with the quarterly summary with changes highlighted in the text of the policy. This service was designed for districts that maintain their own policy manuals. For 2023-24, the cost is \$1,850/year.

Annual Policy Audits (Level 3): For manuals recently developed by Erie 1 BOCES, districts may contract with us for a service that includes Policy Updates (see above) along with an annually customized updating of manuals to reflect the many changes in law and regulations. Proposed changes will be sent to the district in a highlighted fashion for ease of Board review, along with a chart explaining the rationale of each revision. Once the recommended revisions are adopted by the Board, the changes are prepared in multiple copies for insertion into the manuals at the district. New CDs and/or flash drives will be prepared as needed, and an electronic copy is prepared and sent. For 2023-24, the cost of this service is \$3,200 per year.

Comprehensive Administrative (Regulation) Manual: An Administrative Manual may be developed to provide regulations, procedures and forms in compliance with law and District policy and practice. Administrative

Manuals provide documented implementation of Board policy and promote consistency within the District. The Administrative Manual is often developed upon completion of the Policy Manual. As of 2022-23, the cost is \$9,400 and, as with the Policy Manual, the cost and process are usually spread over the course of two years.

Why Choose Erie 1 BOCES Policy Services?

- ◆ Strong, time-honored reputation for providing high-quality policy manuals in a responsive, timely and comprehensive manner that is customized to the needs of the district.
- ◆ Knowledgeable and dedicated staff, who are experienced in education and school law.
- ◆ Well-developed follow-up services to provide options to districts in maintaining and implementing their policies.
- ◆ Aidable services, as a cross-contract with your BOCES.

Questions: For further information, please contact:

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Erie 1 BOCES
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Email: jhallgren@e1b.org

