

Bluffview Montessori School Policy Manual Audit Report

Your School Policy Manual reflects time, thought, energy, and planning. As you review my comments and recommendations, please remember your manual was not formed overnight, nor will it be updated overnight, but the work will be worth the result.

Kind Regards,

Maria Lonis
Associate Director of Management Services

Attached Documents. Two types of documents are included with this audit: the Audit Chart and comparison documents. Each are explained below.

Audit Chart. The Audit Chart shows recommendations based on comparisons between each MSBA Policy to the school's equivalent policy, if available.

Policy Differentiations. The Audit Chart distinguishes between Mandatory Policies (blue), Legal Requirements Policies (green), and Recommended Policies (white). Mandatory policies are those required by federal and/or state law. Each MSBA Policy delineated as Mandatory meets the requirements outlined in the statute mandating the policy. The Legal Requirements Policies are those that reflect legal requirements from either federal and/or state law. Many schools find having these policies in place is a good resource for these legal requirements and a way to update that resource as the laws change. The Recommended Policies are those that help schools function more efficiently.

Recommendations. Within the Audit Chart, one of three recommendations will be indicated: "Add," "Review," or "No Changes."

Add. If the column titled "Add" is marked, the school does not appear to have a policy covering the topic. In such cases it is my recommendation that the school adopt the MSBA Policy.

Review. The column titled "Review" indicates either: (1) the school is using an outdated version of the MSBA Policy which should be updated, or (2) the policy differs substantively from the MSBA Policy and the school should review the policy's content. Suggested changes are provided in the comments section.

No Changes. The column titled "No Changes" indicates no substantive differences exist between the school policy and the MSBA Policy, and nothing should be changed.

Comparison documents. The comparison documents provide an overlapping view of a MSBA Policy and the school's equivalent policy for easier evaluation of the differences and similarities.

Findings. The audit of your Policy Manual yielded the following findings.

- There are 111 policies Bluffview should adopt including 23 Mandatory Policies, 33 Legal Requirements Policies, and 55 Recommended Policies. Bluffview should also adopt the 13 corresponding MSBA forms.
- There are 48 policies in need of review including 16 Mandatory Policies, 17 Legal Requirements Policies, 9 Recommended Policies, and 6 School Policies without MSBA equivalents. Bluffview should also review 1 corresponding MSBA form.
- There are 20 School Policies that should be removed.

Recommendations. The first step in the policy adoption process is the adoption of Model Policy 208 regarding the development, adoption, and implementation of policies. Adopting this policy first is important because it outlines the process the school should use when adopting later policies. Next, I recommend implementing a three-stage plan to complete and update your Policy Manual.

Stage One. Consider the adoption and review any Mandatory Policies and accompanying forms indicated on the Policy Audit Chart.

Stage Two. Consider the adoption and review any Legal Requirements Policies and accompanying forms indicated on the Policy Audit Chart.

Stage Three. Consider the adoption and review any Recommended Policies, school Policies, and accompanying forms indicated on the Policy Audit Chart.

I foresee these stages taking about a year to complete. The school may wish to schedule special meetings to expedite the process.

General Recommendations. If a comment states that inconsistencies exist between school Policy and the MSBA Policy, I strongly encourage you to adopt the language of the MSBA Policy. If you have questions about the statutory mandates, please contact me.

Throughout MSBA Policies are notes about policy language. Often the notes indicate a decision the school needs to make. These notes are meant to be considered by individual schools, acted on if applicable, and then removed. Some of your policies include some of the “notes” from the MSBA Policies and sometimes necessary decisions have not been made. As you make updates, review these notes, make decisions where needed, and then remove the notes.

I have recommended the removal of most policies designated as School Additions, which are policies to which MSBA does not have an equivalent. There are a few reasons for this recommendation.

First, many of these policies contain operational procedures. A policy is a board’s broad statement of direction that sets a course of action and provides schoolwide guidance. Procedures, on the other hand, are developed by the administration to implement the board’s policies. Placing these procedures in policy decreases the administration’s ability to quickly modify procedures for the efficient operation of the school. Thus, operational procedures should be moved to a more flexible document like an employee handbook or administrative manual.

This audit does not provide you with Legal advice. If you need Legal advice in revising your Policy Manual, please contact an attorney.

Second, many of the School Addition Policies are based on law. Thus, the school would be responsible for hiring legal counsel to annually review these policies to ensure they remain legally compliant. This could lead to large legal fees to review policies the school is not required to have. Thus, these policies should be removed.

Throughout the updating process, MSBA will likely release updated versions of our policies. I recommend updating these policies as they are released, even if the policy is part of a stage you are not working on. As you review Legal Requirements and Recommended Policies, keep in mind that schools are not required to have a policy on each of these topics. Your school will need to decide whether including these policies might make governance and administration easier. Most schools have found that having these policies in place is better than not having them.

Policy Changes and Adoptions. Under MSBA Policy 208, the School Board will need to take action to adopt or revise policies to implement the recommended additions and changes.

Procedures. The School Board shall give notice of proposed policy changes or adoption of new policies by placing the item on the agenda of two School Board meetings. The proposals shall be distributed, and public comment will be allowed at both meetings prior to final school Board action.

The final action taken to adopt the proposed policy shall be approved by a simple majority vote of the School Board at a subsequent meeting after the meetings at which public input was received. The policy will be effective on the later of the date of passage or the date stated in the motion.

If a policy is modified because of a legal change over which the School Board has no control, the modified policy may be approved at one meeting at the discretion of the School Board. This will be the case for any policy that simply needs to be updated to the most current version of the MSBA Policy.

Instructions to access the Policy Manual online.

1. Go to the Resources tab on the MSBA website and select Policies
2. Log into the Members area
3. Access the MSBA Policy Reference Manual

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