



College Coordinating Council Work Study Session

September 8, 2021
9:30 a.m. – 10:30 a.m.
SSV – 151 Board Room

Type of Meeting: Regular
Note Taker: Patty McClure, Megan Aceves
Please Review/Bring: Agenda, Minutes

Committee Members:
Van Rider, Academic Senate
Nhe’Zhem Peoples, ASO
Bridget Cook, General Counsel – **CHAIR**
Pamela Ford, Classified Union
Michelle Hernandez, Confidential/Management/Supervisory/Administrators
LaDonna Trimble, Deans
Dr. Aurora Burd, Faculty Union
Isabelle Saber, Vice President of Academic Affairs
Laura Benson, Consultant - Vice President of Human Resources
Dr. Erin Vines, Vice President of Student Services
Shami Brar, Vice President of Administrative Services

WORK STUDY SESSION

Items	Person(s) Responsible	Time	Action
INFORMATION/DISCUSSION/ACTION ITEMS:			
I. Review of CCLC’s Implementation Handbook	All	20 minutes	
II. Review of BP/AP 2410 – Board Policies and Administrative Procedures	All	20 minutes	
III. Review of AVC BP/AP Approval Flow Chart	All	20 minutes	
FUTURE AGENDA ITEMS:			
NEXT MEETING DATE: September 22, 2021			

Join Zoom Meeting

<https://avc.zoom.us/j/93297215529?pwd=NTdiTC9pR1Z4QnZ5TlNoOCtyWitzUT09>

Meeting ID: 932 9721 5529

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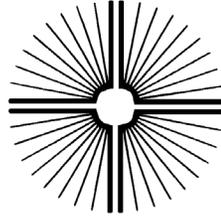
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COMMUNITY COLLEGE LEAGUE OF CALIFORNIA

and



**POLICY & PROCEDURE
SUBSCRIPTION SERVICE**

IMPLEMENTATION HANDBOOK

2017 O Street, Sacramento CA 95811

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www.ccleague.org

2019

Policy & Procedure Subscription Service Overview

The Community College League of California's Policy & Procedure Subscription Service (Service) provides template language for over 390 board policies (BPs) and administrative procedures (APs) for California community colleges. Subscribing districts receive legal updates biannually that alert them to changes in the statutes, regulations, or practice. The Service also sponsors two workshops for subscribers each year, maintains a website and listserv, and provides referrals for consultants to implement the Service.

Subscribing districts report that the Service is invaluable in ensuring that they have up-to-date and useful policies and procedures. They also report that the Service has helped educate trustees and other district/college leaders and made it possible to improve the institution's policy and procedure review processes.

This handbook is designed to assist subscribers in using the Service to its fullest. It is based surveys of subscribers and reports from subscribers about successful implementation strategies when using the Service. Additional tools and sample tracking charts are included in the appendices.

In this handbook, the term "policy" is used to refer to board policy that is adopted by boards of trustees. The term "procedure" is used to refer to administrative procedures, district regulations or similar titles, which are the purview of the district Chief Executive Officer (CEO) and institutional leaders.

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Originally published in October 2007 by Dr. Cindra Smith;
Revised in January 2012, September 2014, January 2019

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Principles of the Subscription Service

The League's Policy & Procedure Subscription Service is based on principles inherent in effective board governance, policy development, and local decision-making. Understanding these principles helps facilitate the implementation process.

Definitions

The Service carefully differentiates between board policies and administrative procedures. Many subscribers report that the differentiation is very helpful in distinguishing the role of the board and the responsibilities of district/college employees.

Board Policy is the voice of the board of trustees and defines the general goals and acceptable practices for the operations of the district. It implements federal and state statutes and regulations. The board, through policy, delegates authority to and through the chief executive to administer the district. The CEO and district employees are responsible to reasonably interpret board policy as well as other relevant statutes and regulations that govern the district.

Policy is best expressed in broad statements. It legally binds the district. Therefore, policy statements should be clear, succinct, and current. Policy and procedure documents should be accessible, useful, up-to-date, and regularly reviewed.

Administrative procedures implement board policy, statutes, and regulations. They address how the general goals of the district are achieved and define the operations of the district. They include details of policy implementation, responsibility, accountability and standards of practice. They are developed and implemented by the CEO, administration, faculty, and staff members; they are not intended to require board action.

(NOTE: The Service uses the term "administrative procedures." There are a variety of terms that may be used, such as administrative regulations, district procedures, college rules, etc.)

Legal Compliance

The Service provides template language for policies and procedures that are required by state and/or federal statute or regulation, or that are legally advised to protect the district. A few additional templates are suggested as good practice/optional.

The Service provides the minimum essential language required or advised by statutes or regulations. The templates provided reflect the delegated authority in the statutes and regulations. If a statute or regulation directs or provides for board authority or action, a board policy template has been provided. Some statutes and regulations mandate district operations but do not require the board to have a policy. In these cases, the Service provides administrative procedure templates, and there is no related board policy.

Legally Required (LR): Legal counsel has determined that these are required based on state or federal statute or regulation. The templates contain the essential elements to assure compliance with state or federal law. However, except as specifically noted at the beginning or in the body of a template, the text may be locally enlarged or modified, as long as no required elements are omitted. It is *strongly recommended* that any substantive modifications to the template language be carefully reviewed by local district legal counsel.

The board policy templates require board action; responsibility to enact procedures is delegated to the CEO and board action is not required.

(NOTE: The Service includes policies and procedures with specific accreditation standard section references in the category of “legally required” due to the importance of complying with the related accreditation standard or accreditation eligibility requirement.)

Legally Advised (LA): These policies and procedures are not specifically required by state or federal statute or regulation; however, legal counsel has identified them as essential to protect the district from potential liability. The templates or samples contain the key elements. Text may be locally enlarged or modified, so long as no required elements are omitted. Substantive modifications to the language should be reviewed by local district legal counsel.

Suggested as Good Practice/Optional (SUG): The Service includes a few sample policies and procedures that are suggested as

good practice or optional and are not required by statutes, regulations, or court cases. These documents may be commonly found in district manuals, promote effective operations, and/or have been requested by a number of subscribers. There is often a high degree of variation from district to district.

Delegation to the CEO

Boards of trustees are authorized to delegate their authority to CEOs, and accreditation standards require that boards do so. The Service recommends that board policies include a blanket delegation policy, such as the sample provided in BP 2430 Delegation of Authority to the CEO as well as specific delegatory language in each board policy.

Template Language

Effective policies and procedures are straightforward, succinct, and contain the minimum language necessary. The Service used the following approaches in drafting the language in the templates.

- ***Recommended Language:*** The wording is closely tied to statutes or regulations, and the Service recommends that the language be adopted as is or with very few changes. Examples include the conflict of interest, harassment, and discrimination policies and procedures, which are technical and sensitive areas. Changes to the language should be reviewed by local district legal counsel.
- ***Suggested or Template Language:*** The wording in the template reflects legal requirements, but is offered as a suggestion. Districts may use their current policy or procedure language, may adopt the Service's template language, or revise the language to fit the organization's culture and needs. Significant changes or additions should be reviewed by local district legal counsel.
- ***Excerpts from Statutes or Regulations:*** The template language includes relevant excerpts from statutes and regulations that should be addressed or included in local policies and procedures. Districts usually need to add language to reflect local circumstances.

- ***Checklist of Concepts:*** The template consists of a checklist of concepts that should be addressed in the policy or procedure but districts have significant flexibility regarding the specific content of the language.
- ***Insert Local Practice:*** The template states “insert current practice,” because either the policy or procedure must be developed through the local decision-making process (e.g. academic freedom and the consultative process itself) or districts have substantial flexibility. No sample language is provided in these cases. Subscribers often request examples from other districts through the Policy & Procedure Subscription Service or other listservs.

Local Control and Options

The League believes that local district control over policies and procedures should be maintained to the maximum degree possible. The language in the templates reflects the minimum that is legally required or advised. Districts have the flexibility to adapt the template language to reflect local conditions and culture using its own policy and procedure development process.

While the Service, by necessity, has numbered and placed the templates in certain chapters, it is just one approach. Subscribing districts may use their own organization and numbering systems. Subscribers also have the option to adjust the level of delegation to the CEO and others, the level of detail in policies and procedures, the process used to implement the Service, and to add policies and procedures beyond those provided by the Service.

Implementation

How Districts Use the Service

Districts report three major approaches to using the Service's policy and procedure templates. The approaches are not mutually exclusive and different approaches may be used for different chapters and individual templates.

As references and reminders: Districts that have current and relevant policy and procedure documents and well-established processes to revise their policies and procedures tend to use the Service's templates and legal updates as references. The templates have been reviewed by legal counsel and include specific legal references, therefore reducing the time and research needed to update local documents. The legal updates serve as a reminder to districts regarding which policies and procedures must be revised in order to comply with legal requirements and remain current.

As resource materials to revise local policies and procedures: Districts that wish to retain much of their current policy and procedure documents have selectively used the policy and procedure templates. They compare the Service's template language with the district's policy and procedure documents:

- If the district/colleges don't have something that the Service indicates is legally required, then the district is alerted that it has been out of compliance and the policy or procedure should be added. The district also carefully reviews the templates that are legally advised and suggested as good practice.
- If the district has policies and/or procedures that the Service does not address, they may be discussed with appropriate personnel to review why they exist and whether or not they continue to be necessary and relevant.

As the basis for new or significantly revised policies and procedures: Districts that have not "overhauled" their policy and/or procedure documents in many years have used the Service's templates as the basis for new/updated policy and procedure documents. Districts adopt new documents, replacing their old documents in total.

Subscribers who have used this approach recommend it highly as it ensures that the district's documents are up-to-date and reflect the minimum legal requirements. Entirely replacing old/former documents with new/updated documents facilitates the deletion of out-of-date policies and procedures and can be much more efficient than an individual policy-by-policy review.

Multi-College Districts

Multi-college districts have the additional challenge of addressing the need for district-wide consistency, while allowing for flexibility to accommodate differing needs of colleges within the district.

Multi-college districts manage the board policy review process in the district office, consulting with college personnel or joint committees when necessary. The district identifies the procedures that need to be consistent for all colleges and where colleges have discretion. District-wide procedures are managed by the district office; college-specific procedure development and update takes place at the college sites.

Where to Start?

The first step in implementing the Service is usually taken when the CEO and/or board of trustees determine that the project is a priority. A process is designed and responsibilities are assigned. A person is assigned the responsibility to coordinate the updating/revision process and most often the CEO's office facilitates the review process.

Districts may hire a consultant to draft new or revised policy and procedure documents using the Service's templates. Approximately 28 Districts have done so including Cabrillo, Cerritos, Chabot-Las Positas, Chaffey, Citrus, Coast, Contra Costa, Hancock, Lassen, Marin, MiraCosta, Monterey Peninsula, Mt. San Antonio, Napa Valley, North Orange County, Palomar, Palo Verde, Pasadena, Redwoods, Riverside, San Bernardino, San Jose/Evergreen, Santa Barbara, Santa Monica, South Orange, Southwestern, West Valley-Mission, and Yuba.

Those involved in the process are encouraged to attend the League's biannual Subscribers' Workshops or to otherwise learn as much about the Service and the resources available to them (see the section on "What People Need to Know"). Districts may request that League staff conduct a workshop at the district for those involved.

Organizing the work of implementing the service takes various forms:

Board Policy First or Policy and Procedure Together: Some subscribers first update their board policy chapters. After those are adopted, they then update the administrative procedures.

The benefits of initially revising the policies are that board policies state broad goals and generally acceptable practice; they establish a firm foundation or umbrella for related administrative procedures. Having current board policy documents protects the district from difficulties resulting from policies that don't comply with current statutes and regulations.

The Service's differentiation of policy and procedure (see page 1) places operational details in the procedures. Districts have capitalized on this approach to move non-policy level detail from current board policies to procedure. If districts update board policy prior to updating procedure, the district should clearly indicate that language deleted from policy will be updated and included in revised procedures later in the process.

Other districts update policies and procedures together at the same time. The benefits of doing so are that policy values and implementing procedures are reviewed and addressed in concert. Often, the process of updating procedures requires substantial time and consultation, because procedures contain the detail on district operations that may significantly affect faculty, staff members, and students. Therefore, updating both policy and procedure at the same time may slow the process considerably.

A Chapter at a Time: Reports from users indicate the best approach is to use the Service's template language to update their board policy and/or administrative procedure manuals a chapter at a time. Doing the update a chapter at a time helps ensure that each chapter is cohesive and comprehensive. It is also easier to see the interrelatedness of documents in sequence within the chapter. Each chapter is reviewed as a whole and policies/procedures that are no longer useful are more easily identified and deleted.

Submitting board policies to the board for approval a chapter at a time (rather than as individual policies) ensures that the board has an opportunity to discuss overarching policy values, better understands relationships between policies, and is knowledgeable about its own policies. However, there are some policies on the board itself, such as

board duties and responsibilities, board ethics, or self-evaluation policies, which may require an in-depth review by board members.

Update as Necessary: Some subscribing districts update policies and procedures on an as-needed basis. The review may be triggered by the Service's update, a problem or question, or as part of a periodic review.

This approach is satisfactory when the district's policies and procedures are in reasonably good shape. It is a doable approach and is often used when it has not been possible or a priority to allocate the employee and resources necessary for a more comprehensive review of each chapter. However, the piecemeal approach makes it more likely that policies and procedures slowly become outdated or out of compliance.

It is also critically important to note that the accreditation standards require the board to regularly review its policies. Therefore, it is most beneficial for districts to create a continuous review cycle within each accreditation period of all policies and procedures.

A Note about Procedures: Subscribers have found that updating policies can be easier than updating procedures. The Service's board policy templates provide language that reflects legal requirements, which districts often use when revising or drafting policy. However, when writing administrative procedures, districts have much more flexibility, and the Service's administrative procedure templates contain checklists rather than sample language. District employees and constituency groups have much more input into procedure than policy; therefore, the updating process may take longer.

What to Know about the Service

Publicizing the Service and educating district employees about its benefits and principles has, according to current subscribers, helped ease the implementation process. The biannual Subscribers Workshops provide excellent information and advice to those responsible for the process. The League's website for the Service posts the policy/procedure templates, biannual legal updates, and other key information.

Following are key issues to address when educating those involved in the process:

Difference between Policy and Procedure: Subscribers have found that educating trustees and district employees about the differentiation between policy and procedure is essential. Clarifying the difference helps with drafting better policies and procedures and clearly delineates board and employee responsibility and authority.

Legal Review: The templates have been drafted or vetted by the law firm of Liebert Cassidy Whitmore (LCW), the League's partner in the Service. The legal team at LCW is well known for their expertise in community college law. Districts avoid the necessity to seek independent legal advice unless the language provided in the templates is significantly modified.

The Service indicates whether a policy or procedure is legally required, legally advised, or suggested as good practice/optional. The policies and procedures that are legally required and legally advised are necessary in order for the district to be in compliance with current statutes/regulations. As such, these legally required and legally advised policies/procedures are an excellent foundation for district documents.

Effective Board Governance: The templates were developed or reviewed by League staff members who are experts on board roles/responsibilities and differentiating policies from administrative procedures. The Service is designed to reinforce board effectiveness and strengthen the appropriate delegation to and accountability of the CEO.

Cost Effective: The fees for the Service are less expensive than what it could cost for a single district to dedicate employee and legal

counsel time to researching the need for updates and drafting the information—time that can be better spent customizing the Service’s templates to the needs of the district.

Roles and Responsibilities

Successfully completing a comprehensive review and update of district policy and procedure documents requires dedicated personnel, time, and other support. Roles and responsibilities include:

- **CEO leadership** to make it a priority to update policies and procedures and to ensure that time and resources are allocated to the implementation process.
- **Board leadership** in expecting up-to-date policies that affirm the board’s role and clearly delegate authority and responsibility to the CEO.
- **Coordinator**, an employee that is responsible to ensure that policies and procedures are up-to-date. The responsibilities may include establishing and coordinating a system to regularly review and revise policies/procedures, including addressing the Service’s biannual legal updates. This person should have the authority and support to track, follow-up, and monitor the process. The CEO’s executive assistant or another senior staff member often has this responsibility.
- **A designee** to draft new and revised policies and procedures. Over a third of member districts have hired a consultant to tackle this task. Other options include reassigning responsibilities to provide time for a district employee to do this or assigning chapters and/or selected sample templates to administrators and others for revision.
- **Constituency groups**, such as the Academic Senate, responsible to review drafts of policies and procedures according to agreed-upon local decision-making processes.
- **The district/college council**, cabinet, or similar group that recommends policy and procedure to the CEO, and/or approves procedure.

Other decisions include:

- ***Who receives the subscription materials from the League:*** The League disseminates a copy of the templates and legal updates to the CEO of each subscribing district, which is distributed according to local decision.
- ***Who is on the listserv:*** The League e-mails the legal updates, workshop invitations, and other alerts to the Policy & Procedure Service listserv. The district determines who is on the listserv and communicates the names and emails to League staff to be added to the listserv.

Tips for Success

The following is advice from subscribing districts for successful implementation:

Spend the time necessary to promote the Service and its principles: Districts have found that it is easier to garner support from those involved (the board, administrators, and constituency group leaders) if they understand and have an opportunity to “buy into” the purposes and definitions of board policy and administrative procedure, and have explored and come to agreement on expectations and roles for board, administration, and constituency groups.

Arrange for reassigned time or a consultant to help do the work: Consider the cost effectiveness of hiring a consultant. Successful consultants include retired employees who understand and are able to write policy and procedures or experienced consultants provided through the League.

Start fresh if possible and when appropriate: Updating old policies and procedures that have not been reviewed in years is much more difficult than “starting over” with the Service’s template language and adding to or editing them to reflect local practice.

Continually reinforce the importance of the review: It is easy to postpone reviewing and updating policies and procedures; there are usually more immediate tasks and issues to address. However, the longer the review of policies and procedures is delayed, the more difficult it is to successfully complete the updating process. CEO leadership is essential in ensuring the review is a priority and a continuous review cycle is implemented.

Use the templates as much as possible: Remind district leaders that the district has paid for the Service and that the templates have been developed and vetted by attorneys. Capitalize on the work that has already been done to develop the templates.

Keep board policy at the board level: Remember that the board policies are the responsibility of the board. Therefore, ask for appropriate employee input into board policy and assure consultation, but defer to the board for final action.

Clarify when contents of old policy will likely be converted

to procedure: The Service has prompted subscribers to question the amount of detail that is included in current board policy. The templates “encourage” districts to delete operational details from board policy that are more appropriately the responsibility of administration. Care should be taken that key provisions are not lost in the process, and that trustees and others are assured that operations will continue to be adequately regulated by the procedures.

Use targeted consultation - don't send everything to everyone:

Asking all constituent groups to review all policies and procedures is not an efficient use of valuable professional time. The review and development process is most effective when the responsibility for revision is delegated to those who have the expertise and background needed for specific policies and procedures. Reviews should involve the district leaders and constituent group representatives directly responsible for or most affected by the policy or procedure. If district practice has been that all constituent groups review all policies and procedures, bring together the leaders of the groups to discuss how to improve the review process. Deciding who reviews which policies and procedures may be based on:

- **Who is most affected:** For example, policies on board operations primarily involve the board and the CEO; therefore review of those policies may be limited to trustees, the district CEO, and his/her immediate staff members. The

Tips for Success

- ✓ Promote the Service to those involved
- ✓ Allocate sufficient time and resources
- ✓ Start fresh if appropriate
- ✓ Use the template language
- ✓ Reinforce policy role of board
- ✓ Clarify when moving policy language to procedure
- ✓ Carefully target who reviews what
- ✓ Clarify board delegation to CEO
- ✓ Reinforce that procedures are responsibility of district leaders
- ✓ Keep the language simple and to the point
- ✓ Do the work a chapter at a time
- ✓ Establish and follow a timeline
- ✓ Be certain to officially rescind/repeal old/contradictory language.

Academic Senate will be involved in reviewing policies and procedures that are academic and professional matters.

- **Legal constraints and district flexibility:** Statutes and regulations limit district options in a number of areas. It is therefore possible, and often advisable, to adopt certain policy and procedure templates with little editing; extensive review may be a misuse of time and resources. Time may be better spent more thoroughly reviewing policies and procedures where there is more flexibility and local option.

Clarify and support delegation to and role of the CEO: As good practice and to fulfill the legal accountability of the district, board policy should contain clear statements of the authority and responsibility the board has delegated to the CEO.

Clarify and support the principle that procedures are the responsibility of the district: Reinforce the responsibility and authority of the district's decision-making processes and bodies to approve procedures. Don't delegate procedural decisions to the board because procedures are the responsibility of administrators, faculty, and staff members.

Develop and send board policies to the board a chapter at a time: As previously discussed, reviewing and updating policies and procedures a chapter at a time provides a better sense of the "big picture" and connections between different policies in the chapter. Consider using the consent agenda for legally required policies, providing background information regarding the legal nature of the policies. If administrative procedures accompany the board policies, emphasize that the procedures are included *for informational purposes only*.

Keep policy and procedure language simple and to the point: Excess verbiage can obfuscate, rather than clarify, policies and procedures.

Establish a timeline and follow it: Designate who has authority to monitor the process and ensure that tasks are accomplished in a timely manner.

Tracking Strategies

The Service's approach to numbering policies and procedures was developed for convenience in identification and categorization. Districts may use their own numbering and chaptering systems. If subscribers choose to do so, many districts have found it necessary to develop a matrix to match the Service's numbering with the unique district numbers. The importance of developing a matrix is necessary when revising policies/procedures based on the Service's legal updates. In addition, districts should have a system to track and monitor the policy and procedure development process.

Examples of tracking charts are included in the appendix. The following elements are usually included in any tracking system:

- League Policy & Procedure Service's numbering system
- District's policy and procedure numbers (former and new, as applicable)
- Title of policy or procedure
- Whether or not current/old policy is being converted from policy to procedure
- Offices and/or specific position(s) responsible for drafting and reviewing the policy/procedure
- Initial draft/review date(s)
- Date reviewed by administration and consultation groups
- Date approved by cabinet/executive council
- Date policy goes to the board for first reading
- Date policy is adopted by the board
- Date the information is posted to a website or otherwise disseminated
- Notes or comments

Disseminating the Policies and Procedures

Policies and procedures are not useful unless they are current and public. The advent of district websites, intranets, and the internet has greatly eased the process of maintaining up-to-date policies and procedures. Subscribers recommend posting the policies and procedures on the district's website and eliminating the traditional policy and procedure manuals retained in binders, which are difficult to keep current and limit accessibility. Master hard copies may be kept in specific locations, such as the CEO's Office and library (for public

access). A few districts print new copies of a board policy each time it is updated and distribute the revised page(s) to board members. Most districts communicate revisions to policies and procedures via emails alerts.

Strategies to ensure employees are familiar with the district's policies and procedures include:

- **Training** during new employee orientations about how to access policies and procedures (via the district web site, intranet, etc.) and should address specific policies and procedures which employees must know to protect themselves and the district—harassment, discrimination, computer use, and copyright, to name a few.
- **Communicating** (via email or other district communication vehicle) updates/revisions to policies and procedures as they are made. The district should maintain a record of how and when employees were notified of changes in case of legal questions.

Frequently Asked Questions

How can we tell if the template language is legally required, legally advised, or suggested as good practice?

Templates that are legally advised or suggested as good practice include an explanatory note as part of the sample language. Templates without such a note are legally required. In a few instances, legally required templates contain some language that is not mandated, although it is strongly advised. Contact the League with specific questions about policy/procedure template language.

Must we use the language in the Service's templates exactly as it is written?

No. However, the language was carefully written and was reviewed by legal counsel. Therefore, changes that affect the meaning and additions that add further constraints should be reviewed by local district legal counsel. There are some exceptions where retaining the language as written is strongly advised, including the policies and procedures related to conflict of interest, discrimination, harassment, auxiliary organizations, and portions of the templates that essentially repeat applicable statutes and/or regulations.

Should we use the Service's numbering system?

It is optional. Districts are encouraged to use systems that have worked well for them in the past. The vast majority of districts use the Service's numbering system in order to avoid the necessity of translating Service templates into district numbers, which is particularly useful when reviewing the Service's biannual legal updates. However, as with any numbering system, the Service's numbering system has limitations and districts may need to adapt it to local circumstances.

Why doesn't the Service provide template language for legally required or legally advised policies/procedures such as academic freedom and ethics?

There are different reasons for not providing template language in each of these areas, and the rationales apply to other policies and procedures as well. Academic freedom is an example of a policy or procedure that requires significant consultation with academic senates. Board and institutional ethics are examples of a policy or procedure that is best developed by involving all constituent groups.

Why does the Service provide templates for a limited number of personnel issues?

Most policy and procedural issues related to personnel are addressed through collective bargaining. Therefore, districts are encouraged to carefully review current collective bargaining agreement language when developing a policy or procedure. Keep in mind that not all constituent groups may be represented by a union; so, it may be necessary to adopt a policy and/or approve a procedure to address the specific needs of unrepresented employees.

Why doesn't the Service provide template language for procedures rather than lists of criteria to consider?

The League believes in local district control of programs and operations to the fullest extent possible. Therefore, in areas where there is significant flexibility and local option, particularly in procedures that implement policy, statutes, and regulations, the Service avoids providing language that might be construed as a model.

How can I obtain samples of policies and procedures from other districts?

Subscribers may send a request for samples to the Policy & Procedure Service listserv, ppsvc@listserv.ccnnext.net. Other excellent sources for samples in specific areas are listservs that target specific professionals, such as chief business, student services, and instructional officers. Most districts have posted their policies and procedures on their public websites and much information may be gathered from a website search. Keep in mind that samples from other districts may not include language that has been vetted by legal counsel. It is *strongly advised* that any unique language added to a policy or procedure template be reviewed by local district legal counsel to ensure the meaning or intent of the law has not been inadvertently compromised.

How much is the Service and what do we get?

The Service has an initial three-year subscription fee to access the set of over 390 policy/procedure templates. The fee also includes biannual legal updates, biannual workshops, and access to the website, listserv, and other resources. After the initial three-year subscription, districts may renew each year for an annual fee to continue to receive the biannual legal updates, receive invitations to the biannual Policy & Procedure Subscription Service Workshops, and take advantage of many other services and beneficial tools.

How do I get on the listserv?

The listserv is for subscribers and is used to distribute the biannual legal updates, details on the biannual workshops, dialog/share information with other districts, and access information on the Service's website. Contact the League Office to check which representatives from your district are currently on the listserv and to request your contact information be added. Only people who are on the listserv may use the listserv.

What is the UserID and Password to access the site?

The website is restricted to district employees in subscribing districts. A district-specific userID and password are provided to each member district. The district-specific userID and password may be obtained by contacting the League.

How can we manage to review and update policy and procedure documents with all of the other district responsibilities and deadlines?

It takes discipline, support, and encouragement to make sure that the updating process is a priority, given all of the other more immediate tasks that demand attention. Strategies that help get the job done include attending biannual subscribers' workshops; establishing a timeline and following it; hiring a consultant; dividing the project into smaller, more manageable tasks; and "celebrating" key accomplishments in the process. Once the policies and procedures are up-to-date, it is critically important to develop a continuous review cycle to systematically update and maintain the policies and procedures. In addition, districts may contract with the League for specific assistance with revising board policies and administrative procedures to bring these documents up-to-date with the Service's templates and to comply with recent revisions in law.

Where can we find a knowledgeable consultant to help us?

The League can provide a consultant to work with district leaders in reviewing current policy and procedure manuals and drafting updates for review. Contact the League for assistance.

When are Subscribers' Workshops and how do we find out about them?

The Subscribers' Workshops are offered in November and in April/May just prior to the League's Annual Convention in the fall and the Annual Trustees Conference in the spring. The workshops are free to subscribers. Workshop invitations and reminders are disseminated via the listserv.

Feedback from Member Districts

The League regularly conducts surveys, interviews, and gathers input from member districts regarding the Policy & Procedure Subscription Service. Results from this feedback provide valuable data to the League regarding the benefits of and necessary improvements to the Service's policies/procedures templates, workshops, listserv, and website.

Comments on the Service in General

"We appreciate the Service very much and are thankful for all you do for us!"

"The Service is timely, accurate, and thorough."

"The Service is well-organized and responsive."

"The League staff members are wonderful, knowledgeable, and responsive."

Comments on Policy/Procedure Templates

"The policy and procedure templates are very useful to our district."

"Our district uses the same numbering system as the Service which makes it far easier to update the appropriate documents when we receive the biannual legal updates. Have the same chapter and document numbers as other districts allows for clear comparison of documents when questions are posted on the listserv."

"The legal research and drafts provided would be very expensive and time consuming if done by each district."

"Great overview of current law with timely legal updates – for both policy and procedure!! Easy access and user friendly."

"The model policies and procedures are an excellent starting point when you are revamping a system that hasn't been updated in 20+ years, especially when you can indicate that a very well-respected law firm has helped develop the documents. Often, just adding the current practices is all that needs to be done and you have a complete, concise document."

"I often down load a complete policy chapter and refer back to procedures and updates."

Comments on the Biannual Subscribers' Workshops

"The biannual Subscribers Workshops allow us to ask questions, seek clarification, and discuss challenges with other districts. It is an ideal opportunity to obtain recommendations and advice from the League, legal counsel, and others."

Comments on the Policy & Procedure Service's Listserv

"The listserv is an incredible resource for us."

"It is an important vehicle for providing requests/responses regarding specific samples from others."

"We have used the Listserv on several occasions and have always received many responses that have been very helpful in determining the direction our District takes in revising or updating a policy/procedure."

"Samples from other districts are extremely helpful."

"Summarizing responses from a listserv question would be helpful."

Comments on the Policy & Procedure Service's Website

"We use the website frequently to download needed policy/procedure templates."

"Absolutely love the on-line set-up – it's perfect."

"I have always been able to find everything I needed on the website."

"I have found the website to be extremely helpful at times – especially that I can access each legal update individually. It has really saved me some agony!"

Comments on Support Services/Consultants

"The consultants available to assist Districts have such high credentials – I would not have been able to even begin on our process without our consultant."

"The consultant who has worked with our district was an invaluable resource and provided knowledgeable insight and expertise."

"Our policies and procedures would never have gotten updated without the hard work and incredible guidance of our consultant. Many thanks!!"

Appendix: Sample Tracking Charts

Sample 1. Matrix of District Numbering System Compared to Policy/Proced. Service Numbering System

Old/Current Policy or Procedure #	Old/Current Policy or Procedure Title	New Policy or Procedure #	New Policy or Procedure Title	Notes

Sample 2. Chapter Tracking Chart

Board Policy Number and Title	Manager responsible	Date rec'd	Date to Leadership Council	Date Approved by Leadership Council	Date to Board 1st Reading	Date of Board Action	Notes
BP 5010 Admissions and Concurrent Enrollment							
BP 5015 Residence Determination							
BP 5020 Nonresident Tuition							
BP 5030 Fees							
BP 5035 Withholding of Student Records							
BP 5040 Student Records, Directory Info. & Privacy							
BP 5050 Student Success and Support Program							
BP 5052 Open Enrollment							
BP 5055 Enrollment Priorities							
Etc.							

Sample 3. Board Policy Matrix

Policy Title	P&P Serv. Policy #	Replaces former Policy #	Board Approval	Last Modified	LR /LA SUG*	Legal References	Notes
Chapter 1 – The District							
Community College District	BP 1100				LR	Ed Code Section 72000(b)	
College Mission	BP 1200				LR	Accreditation Standard IA	
Chapter 2 – Board of Trustees							
Board Membership	BP 2010				LR	Ed Code Sections 72023, 72103, and 72104; Accreditation Standard IV.C.6	
Student Member(s)	BP 2015				LR	Ed Code Section 72023.5	
Board Elections	BP 2100				LA	Ed Code Sections 5000 et seq. and 72036	
Election of Student Member(s)	BP 2105				LA	Ed Code Sections 72023.5 and 72103	
Vacancies on the Board	BP 2110				LR/SUG	Ed Code Sections 5090 et seq.; Gov't. Code Section 1770	
Term Limits	BP 2130				SUG	Ed Code Section 72103(c)	
Board Duties and Responsibilities	BP 2200				SUG	Accreditation Standard IV	
Officers	BP 2210				LR/SUG	Ed Code Section 72000	
Committees of the Board	BP 2220				LR/LA	Gov't. Code Section 54952	
Etc.							

*LR – Legally Required

LA – Legally Advised

SUG - Suggested as good practice

A Checklist of Tasks

The following steps are a roadmap to success:

- Discuss the process with the board and obtain its support. Reinforce that the board is responsible for policies and the procedures are the responsibility of the CEO and institutional leaders.
- Ensure and publicize the full support of CEO.
- Obtain the support of the management, leadership councils, and other key constituents.
- Define and publicize the process.
- Assign roles and responsibilities and consider hiring a consultant, if necessary. Define who is involved in the various parts of the review.
- Establish, publicize, and follow a timeline.
- Educate those involved about the Service and resources available (see above).
- Develop a tracking system in order to monitor the process.
- Define the points at which local district legal counsel may need to be consulted.
- Clarify the job positions and groups who must participate in the review, including whether the recommendation is an academic and professional matter subject to mutual agreement or reliance on the recommendation.
- Clarify who has final approval (e.g. the board for board policies; CEO and/or a college council for administrative procedures).
- Rescind/repeal any old or noncompliant language from the policies/procedures to avoid the possibility of conflicting documents.
- After final approval, disseminate policies and procedures. Post them on the district website and notify personnel of the updates.
- Establish a regular, ongoing review process connected to the Service's biannual legal updates as well as the accreditation cycle.

BP 2410 Board Policies and Administrative Procedures

References:

Education Code Section 70902;
Accreditation Standards I.B.7, I.C.5, and IV.C.7

The Board of Trustees may adopt such policies as are authorized by law or determined by the Board of Trustees to be necessary for the efficient operation of the District. Board policies are intended to be statements of intent by the Board of Trustees on a specific issue within its subject matter jurisdiction.

The policies have been written to be consistent with provisions of law, but do not encompass all laws relating to District activities. All District employees are expected to know of and observe all provisions of law pertinent to their job responsibilities.

Policies of the Board of Trustees may be adopted, revised, added to, or amended at any regular board meeting by a majority vote. Proposed changes or additions shall be introduced not less than one regular meeting prior to the meeting at which action is recommended. The Board of Trustees shall regularly assess its policies for effectiveness in fulfilling the District's mission.

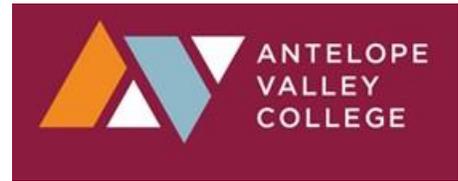
Administrative procedures are to be issued by the Superintendent/President as statements of method to be used in implementing board policy. Such administrative procedures shall be consistent with the intent of board policy. Administrative procedures may be revised as deemed necessary by the Superintendent/President.

The Superintendent/President shall provide each member of the Board of Trustees with revisions to existing administrative procedures at any time, and biennially with new administrative procedures from CCLC within sixty (60) days of receipt of the recommended updates. The Board of Trustees reserves the right to direct revisions of the administrative procedures should they, in the Board's judgment, be inconsistent with the Board's own policies.

Copies of all board policies and administrative procedures shall be readily available to District employees through the Superintendent/President and on the AVC website.

Also see AP 2410 Board Policies and Administrative Procedures.

Adopted: 7/5/05
Reviewed: 8/8/16
Revised: 9/9/19



AP 2410 Board Policies and Administrative Procedures

References:

Education Code Section 70902;
Accreditation Standards I.B.7, I.C.5, and IV.C.7

1. A recommendation for a change in, or new, board policy or administrative procedure from a campus-wide participatory governance committee, recognized campus constituent group, or administrator will be distributed to all faculty, Associated Student Organization (ASO), classified staff and administrators for feedback at least 30 days prior to making a recommendation to the College Coordinating Council (CCC) and Superintendent/President. The campus-wide committee, recognized constituent group, or administrator initiating the recommendation must review the feedback from the campus constituent groups prior to forwarding a final recommendation to the CCC and the Superintendent/President.
2. The CCC will review recommendations only for the purpose of determining if any part of the recommendation involves an academic and professional matter or a collective bargaining issue. Academic and professional matters and collective bargaining issues will be forwarded to the Superintendent/President and either the Academic Senate or Collective Bargaining Agent as appropriate. The Superintendent/President and the appropriate Collective Bargaining Agent or the Academic Senate will determine the most appropriate process for resolution of the issue.
3. If the recommendation does not involve an academic and professional matter or a collective bargaining issue, the Superintendent/President will either send the recommendation on to the Board or implement it. If the Superintendent/President rejects all or part of the recommendation, the Superintendent/President will communicate to the appropriate committee and the CCC the reason for the rejection in a written statement. The CCC Chair will communicate the final recommendation to all campus constituent groups.
4. When the Community College League of California (CCLC) recommends new board policies or administrative procedures, or recommends modifications to existing policies or procedures, the CCC will review the CCLC recommendations. If the recommendation is addressing an academic and professional matter or a collective bargaining issue, the Superintendent/President and the appropriate Collective Bargaining Agent or the Academic Senate will recommend adoption or modification of the proposed CCLC board policies and administrative procedures to the Board of Trustees.
5. If the board policies and administrative procedures affect all campus constituencies, the CCC will forward the CCLC board policies and administrative procedures to all

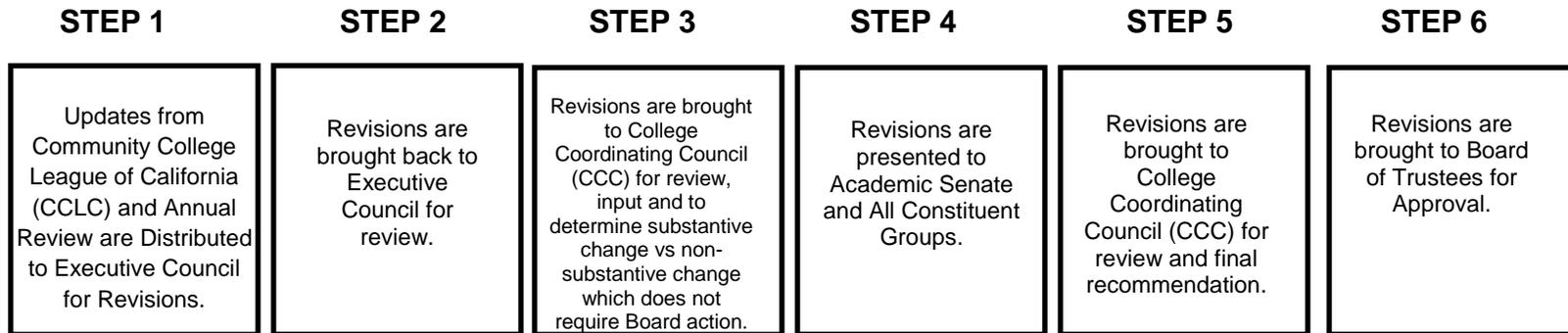


campus constituent groups and relevant committees for review and feedback along with a recommendation to adopt, modify, or reject the board policies or administrative procedures and the reasoning for the recommendation. Feedback must be solicited at least 30 days prior to making a final recommendation and the CCC must review the feedback prior to forwarding a final recommendation to the College Superintendent/President.

Approved: 7/5/05
Reviewed: 8/8/16
Revised: 9/9/19



PROCEDURE FOR REVIEW AND APPROVAL OF BOARD POLICIES AND ADMINISTRATIVE PROCEDURES



30 Days

STEP 1

Updates from CCLC and Annual Review are distributed to Executive Council for revisions.

STEP 2

Revisions are brought back to Executive Council for review.

STEP 3

Revisions are brought to College Coordinating Council (CCC) for review, input and to determine substantive change vs non-substantive change which does not require Board action.

STEP 4

Revisions are presented to Academic Policies & Procedures (AP & P), Academic Senate and All Constituent Groups for 30 days for review and input.

STEP 5

Revisions are brought back to College Coordinating Council (CCC) for review and final recommendation.

STEP 6

Revisions are brought to the Board of Trustees for Approval.

Revised 1.14.19