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A COOPERATIVE APPROACH TO THE DEVELOPMENT OF WRITTEN
SCHOOL BOARD POLICIES FOR THE SOMERS, MONTANA
SCHOOL DISTRICT NO. 29

by

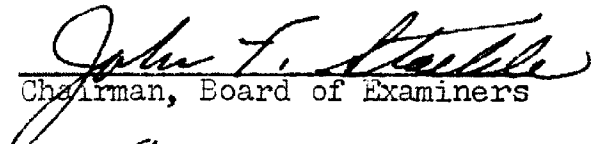
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B. S. Montana State College, 1949

Presented in partial fulfillment of the requirements
for the degree of Master of Education
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1957

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CHAPTER I

INTRODUCTION

During the fall of 1955, the Board of Trustees and the Superintendent of School District No. 29, Somers, Montana, initiated a project to develop a cooperatively formulated written policy manual. Because the project was to be developed on a cooperative basis, the participants in the task included: three board members, eight teachers, fifteen lay persons selected on a volunteer-interest basis, and the school superintendent. Somers is a third-class school district composed of grades one through eight. Though the school is classed as an urban school, the surrounding environs are more rural in nature.

I. SETTING

Because of a fire in 1952 that completely destroyed the school building and contents, policies, board minutes and other pertinent records were lost. Changes in school-community relationships brought about by the addition of a new and modern school building, district reorganization problems, resignation of the clerk of the Board, who had been serving for eighteen years, and other administrative problems, showed a need for a written school board policy manual which would suit the purposes of the Somers school.

The first task confronting the Board and Superintendent was that of determining a method for the development of the written School Board Policy. To crystallize the thinking of the Board and Superintendent,

and to better define the task, consideration was given to the needs of the school. In order to establish this, the following questions were submitted to the Board by the Superintendent:

1. Is the community of Somers apathetic toward the school?
2. Does the community of Somers rally to the support of the school?
3. What do people in the community of Somers say about the school?
4. What is the rate of teacher turnover in the school?
5. How does the per pupil cost compare with other schools in the area?

These questions were then informally discussed at a later board meeting. As no conclusive answers were drawn from this discussion, and there was doubt in the minds of the board members as to the answers to questions (1), (2), and (3), this discussion led the board members to believe that a written statement of school board policy and a working relationship based on a cooperative approach would be beneficial to the school, board members, the administrator, the teachers, other employees, patrons, pupils, and the community.

Grieder, discussing policy development in school administration, suggests that because the superintendent probably has a better command of principles, facts, and objectives than do board members, recommendations for policy planning should be made by the superintendent. His recommendations on policy should grow out of a cooperative study of problems by the superintendent and advisory groups both in the system

and the school district.¹

The Board of Trustees authorized the Superintendent to draw up a plan of action for the cooperative development of a school board policy. Briefly, the procedure involved was:

1. To discover if such a plan was desirable.
2. To discover a process to be employed in the plan.
3. To discover a guide or framework to be used as background instructional material for those persons involved in the plan.
4. To discover a policy classification design to be used as a guide in the development of the written policy.
5. To develop a written policy for Somers Public School.

A review of related literature covering the use of teaching personnel and lay groups in the development of written policies was undertaken by the Superintendent. The purpose of this undertaking was to establish and analyze pertinent findings in an attempt to justify the use of a cooperative approach in developing written policy at Somers, Montana.

There are a few studies devoted to the use of a "democratic process" in the development of school board policies.

The way in which cooperative written policies might improve the education program through their effects on employees other than administrative staff has received less attention over the past years than such other aspects as the value of a written policy and procedure. The National Education Association in a widely distributed leaflet has

¹ Calvin Grieder, "Citizen's Advisory Committees," Nation's Schools, 28:29-30, September, 1941.

treated the subject of a cooperative approach in some detail and in part states:

Back of the procedures within a school system are policies based upon some type of standards and values. Where democratic ideals prevail, the personnel practices magnify the dignity and worth of the individual teacher. In turn, the teacher is stimulated to personify American ideals in daily living with children and youth.²

While it is the contention of this leaflet that policies developed on a cooperative basis stimulate teachers to these heights, it may be difficult to prove. There have been attempts to study the effect of policies and group participation in policy-making on the teaching staff. Green's study lends some strength to the idea.³ He found that teachers tend to prefer school systems with written policies over other systems.

Several writers, notably Griffiths, have found school systems which have attempted to involve teacher and lay groups in policy-making. He says the superintendents who were rated most successful by a committee of judges had teachers and lay groups formulate policy to a much greater degree than do those superintendents who were rated least successful.⁴

Chase reported on questionnaire returns from 1,743 teachers which he says indicate:

Feeling on the part of teachers that they have an opportunity to

²Committee on Tenure and Academic Freedom, Practical Personnel Policies Essential for Good Schools (Washington: National Education Association, 1953), p. 28.

³David L. Green, "A Study of Factors Affecting Desirability of Teaching Positions" (unpublished Doctoral dissertation, Stanford University, Stanford, 1940)

⁴Daniel E. Griffiths, Human Relations in School Administration (New York: Appleton-Century-Crofts, Inc., 1955).

participate regularly and actively in education planning and policy making is closely related to the extent of satisfaction which they have with the system in which they are working.⁵

Wilcox underscored the importance of policy legislation as a function of a community school process:

1. Lack of written policy and procedure results in an educational program that vacillates with the ideas and ideals of the individual teacher and administrator.

2. The absence of well-formulated policies and procedures results in conflicting acts by school officials who attempt to settle each case on its merits without regard to precedent or anticipation of future events. Such acts may eventually promulgate policy which will result in extreme community conflict.

3. Local schools are a vital institution in the preservation of the American democratic ideal. As such they are the concern of all the people. Boards of education as representatives of the people are obligated to consult their constituents so as to insure that educational policy represents their desires.

4. Lay advisory groups when well selected, adequately oriented, and specifically charged with responsibility, provide a desirable means of involving community participation in school affairs. They do, however, constitute another area of administrative (and board) responsibility and as such require constant guidance and motivation.

5. The unique character of the rural (community) school requires that policies and procedures be formulated in relation to the needs of the rural community and rural children. To attempt through policy formation to mold such schools in the character of their big city counterparts would in itself be a violation of community, area, and regional rights.⁶

Many advocates of written school board policy urge the inclusion of lay persons in the formulation of policies for adoption. Schooling in a study of lay committees in Missouri in 1954, found that of one hundred eleven schools given the highest rating by the Missouri State Department of Education, eighty-one per cent reported the existence of lay committee participation.⁷

⁵Francis S. Chase, "Factors for Satisfaction in Teaching" Phi Delta Kappan, (November, 1951), p. 129.

⁶John Wilcox, "Formulating School Policy and Procedure," (unpublished thesis, Cornell University, Ithaca, September, 1953).

⁷Herbert W. Schooling, "The Use of Lay Citizens Advisory Committees in Selected Missouri Public Schools," (unpublished dissertation, University of Missouri, Columbia, 1954).

Writers in the field of school administration concur that written school board policies and procedures provide for district advantages not evident in unwritten and disorganized school policy.

Grieder's summary of policy planning and formulation typifies the findings in the field. He lists five advantages found in the systematic development of written school board policies. They are:

1. A means of orienting new board members, teaching personnel and employees.
2. Beneficial in providing guidance for the school system.
3. Lend continuity to the school system.
4. Improve the general efficiency and strengthening of public relations.⁸

Chase, after reviewing the evidence in a recent study of factors affecting teacher morale, concluded that:

1. Many teachers derive intense satisfaction from participation in educational planning, including sharing in policy planning with regard to instruction, working conditions, and teacher welfare.
2. Joint participation of teachers with citizens of the community in educational planning and policy increases materially the satisfaction of teachers.⁹

An analysis of the foregoing considerations suggests that teachers and lay persons would have the implicit right to share in policy making, and that it was reasonable to predict that the effectiveness of the school board, teaching personnel, and lay persons might be improved in the following ways: (1) a cooperative approach to the development of a written policy may best suit the purposes of Somers Public School, (2) a systematic plan of action governing the process to be used, (3) the overall efficiency of the administration of Somers

⁸Grieder, op. cit., pp. 138-139.

⁹Francis S. Chase, "The Teacher and Policy Making," Administrator's Notebook, 1:1-4, (May, 1952).

Public School may be improved, (4) a cooperative approach may prove a desirable means of involving community participation in school affairs,

II. . PURPOSE OF THE STUDY

The purpose of this study was to select principles and theories from the professional literature, and to use those theories and principles in analyzing the procedure employed in structuring the development of school board policies at Somers, Montana.

What is proposed here is simply one way of thinking or a point of view regarding the "Community School" which may provide for more satisfactory relationships between board and administrative personnel, board and other employees, and the board and the public, as well as between teachers and pupils.

Importance. A statement of board policy is a statement of the philosophy of the board. It is an attempt to put into an action-guide the objectives, purposes, and general operation philosophy of the board.¹⁰ Like a man's personal philosophy, board policy has resulted from the interaction of the board with other community forces, persons, state agencies, the staff, and members of its own group. No more than a man could set out his personal philosophy without reference to his previous experience, can a board adopt a statement of policies without reference to previous experiences and the social climate in which it operates.

Many attempts have been made to be definitive about the role of

¹⁰Frances S. Chase, "School Board Policies Development," Administrator's Notebook, 2:1-4, September, 1953.

the school in the community. The yearbook of the Rural Department of the National Education Association broadly outlines the character of the community school as a school that has two distinct phases: (1) service to the entire community, and (2) discovery, development, and use of community resources as a part of the educational facilities of the school.¹¹

If these two phases are to be implemented, it is essential that: (1) the school organization be kept close enough to the people so that the people are encouraged to develop a strong personal interest in the school program, (2) the program of the school be built upon the educational needs of the community, and (3) those primarily concerned with the functions of the school be considered indispensable resources.

In this study such statements may avoid misunderstandings and confusion by defining responsibilities and authority, and by stating policies so that they may be readily interpreted at any level of responsibility.

The public and teaching staff may better understand and appreciate the school system when authoritatively informed through written policy which they have a part in developing. Written policies that have been developed by a "democratic" procedure may lend continuity and consistency to the board's position and stand as a bulwark against pressure groups.

III. DEFINITIONS OF TERMS USED

Written policies. For the purpose of this study, written

¹¹Robert M. Isenberg, (editor), Yearbook, Department of Rural Education, The Community School and the Intermediate District (Washington: National Education Association, 1954).

policies are defined as general statements of policies, principles, and rules suggested to the Board of Trustees and designed to establish the positions, functions, and relationships of all school district personnel and services, and to provide common guides for the administrative staff and other employees of the school board.

Cooperative approach. This term is defined as an effort on the part of the Board of Trustees, the Administrator, the teaching staff, and a representative community group, through group studies and planning to determine a guiding philosophy and to assist the board of trustees in policy formation.

IV. LIMITATIONS

This study was pursued at the request of the local school board; it was carried on with a minimum of detail, and with an attempt to present a practical and usable design based on a particular concept. The use of a cooperative approach in the development of a school policy is to some extent experimental and time consuming. It was, therefore, anticipated that the policy manual in its entirety will not be completed at the submission of this paper.

This study was concerned with the description and analysis of the processes used in formulating cooperatively written school board policy for Somers School. In general, more attention has been given to a process for policy development than to effective ways of codifying policy.

It is anticipated that this study will raise certain questions about the process used which may suggest areas for further study rather than establish criteria or methods to be used in the writing of school

board policies.

V. THE SEQUENTIAL DEVELOPMENT OF THE PLAN FOR
POLICY FORMULATION AT SOMERS

1. The superintendent reviewed for the school board literature covering the use of teacher and lay groups in the formulation of written school policy.

2. The Somers School Board authorized the superintendent to initiate a plan for the development of a cooperatively written school board policy.

3. The superintendent then explored policy development of other schools and suggestions for policy development by authorities in the field.

4. Findings of this exploration were presented to the school staff at a regular staff meeting, and with the help of the staff a plan of action was established. Immediately following this meeting, a letter was sent to residents of the school district explaining the proposal for cooperatively developing written school board policies for Somers. Response was requested on the basis of interest in the plan.

5. At a regular board meeting the development of Areas I, II, III, and IV of the policy classification design was undertaken by the board and superintendent.

6. Arrangements were then made by the superintendent to hold an organizational meeting of both the teacher and lay groups. This was followed by the groups meeting jointly on two more occasions. Article V of the classification design was developed by the lay group during these meetings.

7. Methods of policy development and group process were reviewed for the groups by the superintendent at the third meeting. On the basis of this review, and a discussion by the groups, a pattern to be employed in the process of policy formulation was established.

8. Group-selected representatives of both groups met with the school board at regular board meetings to discuss their proposals and recommendations for policy adoption.

CHAPTER II

THE STRUCTURE FOR POLICY DEVELOPMENT

The first step in the process was to develop a policy classification design that would serve the following purposes: (1) as a framework for developing written policies, (2) as a guide for group study and discussion, and (3) as a form of reference for group activities.

The first area for which policies were to be classified was that of general administration. The board decided that this task should fall to the superintendent. The procedure was to be that of an exploratory one given over to the preparation and revision of a draft covering responsibilities of the superintendent. This material after being presented to the Board of Trustees, was discussed, adopted, and became **Article II** of the classification.

The superintendent was then instructed to work with two members of the Board to draw up Article I, the portion of the written policies which was to deal with board philosophy, operation, and procedure. This proved to be the easiest part of the design to write because of the wealth of material available in the related literature.

Article III dealing with pupil personnel and Article IV dealing with certificated and non-certificated personnel were developed with the help of the teaching staff and the custodian. As time would allow, the teaching staff and the superintendent reviewed personnel policies of other schools, visited other schools, and secured the assistance of

a school superintendent and teacher from another school in an effort to broaden the perspective for future planning. In the development of Articles III and IV, the groups felt that a check list was necessary to provide a reasonable point of departure for both teacher and lay group discussion. The following checklist was closely followed in developing the drafts for Articles III and IV.

Policies affecting pupils

| | |
|---------------------|----------|
| School entrance | Safety |
| Non-resident pupils | Behavior |

Policies affecting employed personnel

| | |
|--------------------------|-------------------------------|
| Election and re-election | Staff relations |
| Dismissal | Non-certificated personnel |
| Community relations | |

The approach to Article V dealing with community use of the school facilities and equipment required a multiple approach initiated by the superintendent. Representatives of community groups desiring to use school facilities were invited to attend a meeting at the school at which both the teacher and lay groups would be present. The superintendent reviewed past board minutes, precedents, and current problems involved in the community use of the school facilities and equipment. Comments and needs of the representatives were noted and were later used as a policy draft proposal guide by the groups participating in the policy development plan. The following check list was closely followed in developing the draft for Article V.

Policies governing use of school facilities

Use of buildings and equipment during school year

Use of building during summer months
Use of building by school groups
Use of building by church groups
Use of building by commercial groups
Use of building by groups outside of school district

II. CRITERIA FOR POLICY ADOPTION

Preliminary testing of policies was considered by Board members to be of utmost importance if policies were to conform to desired goals.

The following criteria were established by Board members through discussion led by the superintendent: (1) is the statement in agreement with the purposes of the school? (2) is it sound in terms of good educational practice? (3) does it provide for the welfare of the children? (4) is it flexible enough to be functional without being too general? (5) is it in keeping with the requirements of the law? (6) does it satisfy accreditation standards which apply to the school? (7) will it make sense to the community? (8) will it serve a definite purpose? In reviewing policies of other schools, the Board felt that some policies were complex and repetitious.

III. DEVELOPING THE PROCEDURE

Group selection. Toy, in his study on the methods of group selection of lay advisory committees, states that in all probability the method which will work best in any given community depends on the purpose, the length of term, and the makeup of the community.¹

¹Henry C. Toy, Jr., "Lay Advisory Committees," Nation's Schools 46:26, July, 1950.

In the past, community response towards school committee service had in most cases been complacent. For this reason and to expedite the organization of the lay group, the Somers School Board felt the superintendent should make the selection. Accordingly, a short letter describing the nature of the plan was sent to 374 residents of the school district. The school district tax rolls were used as a basis for the mailing list. Of the total, sixty-two replies were received. Expressing interest in this plan were forty-seven parents of Somers School children; fifteen had no children in school but were taxpayers in the school district. Of the total number of persons replying, fifteen attended the organizational meeting and subsequently made up the lay group committee which participated in this study. All members were mothers of children attending Somers School; none had children in high school.

It was evident that the group of fifteen members was not a representative one. The size of the group did, however, contribute to its ability to function. It may be significant to note that throughout the study, the average attendance of this group was ten. Criteria for group size as set forth by Thelan indicates a discussion group should not exceed fifteen members if it is to be flexible and functional.²

The teaching group was made up of all eight teachers employed at the Somers School. The average professional training of this group was two and one-half years. The average experience in the Somers School

²Herbert A. Thelan, Dynamics of Groups at Work (Chicago: University of Chicago, 1954), p. 63.

system was also two and one-half years. The average professional experience was six years.

A theoretical framework. It was pointed out earlier that much has been written covering the advantages of community and staff participation in formulating school policy, but little information is available as to the procedures employed. This statement is further supported by Mort and Vincent who state, "In actual practice, most communities are a long way from having a satisfactory pattern of cooperation between the school board, the professional staff, and the community. There is real need for the development of patterns in line with the concept of community partnership."³

In the light of this and other data contributed by the same authors, the Somers School Board authorized the superintendent to initiate a plan of action. The teaching staff and lay group were to be included in this step. The purpose of this plan was to develop a theoretical framework upon which the school and community could approach the formulation of written policy on a cooperative basis.

The superintendent, in preparation for the adoption of a framework, set forth the following pattern: (1) the purpose of the project, (2) scope of group meetings, (3) legal limitations of the group, (4) integration of proposals and recommendations of the group, and (5) method of group agreement. The first meeting included teaching personnel and lay members and was considered to be an organizational meeting devoted to the development of the theoretical framework based

³Paul R. Mort and William S. Vincent, Introduction to American Education (New York: McGraw-Hill, 1954), p. 65.

on the foregoing patterns. After presenting a review of the overall plan, the superintendent introduced the pattern for the framework to the groups for general discussion. Two meetings were required to complete the framework which appears in its original form as follows:

1. The purpose of project.

The groups recognized the purpose of the project as establishing a plan of cooperation between the school and community in the development of a written school board policy.

2. Scope of group meetings.

There was a concensus within the group that disaussion and proposals should be based on current problems in the school and community.

3. Legal limitations of the group.

The group recognized that the legal responsibility for policy adoption lay with the school board.

4. Methods of integration of proposals and recommendations of the group.

The group felt that they should have representation at the school board level when submitting group proposals and recommendations for policy adoption.

5. Method of group agreement.

The group recognized the need for consensus and concentration on areas where general interest prevailed.

For the purpose of making the framework functional, the third meeting of the groups was devoted to a review of human relations techniques. This review was conducted by the superintendent, and from a

group discussion of the review, the following principles were selected as a basis for implementing the framework into a process to be used in the development of written policies: (1) define and limit the problem, (2) determine the objective, (3) collection of the evidence, (4) arrive at a solution, (5) use of consultants, and (6) standards for meetings.

Defining and limiting the problem. The first task which faced the group was the defining and limiting of the problems before the group. The group felt they should know the answers to such questions as: What are the problems? How broad a look do we take at the problem? What kinds of answers should we seek? These answers set the framework within which the group worked. In order to define and limit the problems for the groups, a review of existing problems was covered by the superintendent. These problems were considered to be pertinent to the group:

1. Community use of school facilities and equipment.
2. Pupil transportation problems.
3. Crowded facilities in the primary grades.
4. Completion of school building program.
5. Establishment of extra curricular programs.
6. School district reorganizational problems.
7. Reorganization of school lunch program.

The selection of a problem which can be studied by research techniques, but which is also embedded in the ongoing activities of the school is a point at which the school system may well provide a starting point for group discussion.⁴ In this study, the superintendent was in

⁴Francis S. Chase, "The Teacher and Policy Making," Administrator's Notebook 1: , May, 1952.

a strategic position for leadership. He was a normal member of the group and had available detailed knowledge of the problems at hand.

Guidance in the selection of a problem, whether by the superintendent or a consultant, involved appraisal of the ongoing school program to a point where each group member could locate an area for some improvement.

Determining the group objective. It is important for the group to know where it is going. It is possible to analyze, define, and limit the problem, clear up the semantic problems, and still not get anywhere. The group needs to determine its purpose in holding its meeting. Many meetings appear to be fine--the discussion is lively, everyone participates--yet the group gets nowhere. The group should determine the objective towards which it is striving.⁵ In an effort to determine the objective, the groups asked several questions. The following were considered as basic to the principles determining the objectives as set forth by Roethlisberger: (1) Will we arrive at a plan? (2) Is this discussion for our own information? (3) Will our plan be put into action? (4) Will a decision be expected, and if so, what will be done with it?

Collection of the evidence. What are the facts? Where can we get them? Who can help us to solve our problems? It was at this point that the group discuss the use of consultants. No problem should be undertaken until all known facts are available.

Arrive at a solution. With the evidence collected and a goal established, the group needs to consider the possible solutions to the

⁵F. J. Roethlisberger, Management and Morale (Cambridge, Massachusetts: Harvard University, 1952), pp. 149-150.

problem it has set itself. Once all possible solutions are put forth, one should be selected. At this stage the group should strive for an unanimous decision. This is particularly true if the group is to put its decision into action. Although such a decision may result in a solution which is somewhat "watered down," the long-range benefits of full support from the group should outweigh this drawback. The group should settle for less than complete consensus only when it is obviously impossible to get all to agree. If a very small number of members remain adamant, then it should proceed with the majority point of view.⁶

Use of consultants. An important consideration of the group was that the broadest use of professional experience should be utilized. Accordingly, the assistance of four school administrators, and the County Superintendent of Schools was obtained. They lent further flexibility to the process by consenting to attend meetings on short notice. The responsibility for coordinating the procedure fell to the superintendent.

Standards for meetings. Meeting standards were selected as a result of a review of the findings in a study by Cook and Full.⁷ They set up five desirable standards for the conduct of faculty meetings and then surveyed 240 schools to see how well the standards were being met. The school systems failed to meet four out of five of these standards. From a review of the above study by the superintendent, the group selected the following standards for this study:

1. Needs must be focused on educational problems growing out of the immediate school environment.

⁶Ibid., p. 182

⁷K. A. Cook and Harold Full, "Is the School Faculty Meeting Significant in Promoting Professional Growth?" School Review, 50:519-524, November, 1946.

2. Meetings must be concerned with problems having educational import.
3. Meetings must be well planned with all members participating in the planning.
4. Members must prepare for the meetings.
5. Informal participating should characterize the discussion in faculty meetings.

The process in action. The development of the Somers School policy on community use of school facilities serves as an example of how the consideration of the process involved was used to reach a satisfactory solution.

The problem involved was a perennial one and dealt with what organizations in Somers could use the school facilities without charge. The objective was to evolve a plan that would satisfy the needs of those organizations desiring to use the school facilities without charge, and, at the same time, meet with School Board approval.

The task of collecting the evidence was initiated by the superintendent who reviewed related policies of other schools in the area. A lay committee member then discussed the needs and purposes of the community group. This was followed by a member of the Board of Trustees speaking to the group on problems encountered in the community use of school facilities. To cover the legal aspects of the problem, the County Superintendent of Schools was invited to participate.

To reach a solution, several possible considerations were listed on a blackboard. A teacher-lay committee was then appointed to study all the solutions and make specific recommendations at the next meeting. At the completion of this, the superintendent submitted the recommendations of the committee (which had been unanimously approved by the group) to the School Board, who with a few minor changes, found it met previously established criteria for policy adoption. The recommendations

of the plan were the incorporated into written policy and became effective immediately.

An analysis of this example indicates that the group process used throughout this study was an important factor in the solution to the problem of what groups could use school facilities.

Legal limitations. A critical point in the process development was reached when the question arose, who would make the final decision? Griffiths, in his investigation of an area which he calls "group decision" states that,

For some time now, American educators have supported the principle that all who might be affected by a decisions should share in making it. This principle has its basis in that somewhat nebulous concept known as 'democratic administration.'⁸

Recently, there has been a considerable amount of discussion as to the validity of this principle. Spaulding, among others, raises some fundamental questions: What about those who are uninformed, who do not know that a decisions is about to be made? How many of them would feel that they should participate if they knew what was going on? Who is to inform them? How many are to be informed? These questions have no present answer. It may be that they are not answerable.⁹

The arguments for decision-making in group process are equally vigorous. Wiles has this to say: The decision-making process is the most important phase of successful democratic leadership, because sharing

⁸ Daniel E. Griffiths, Human Relations in School Administration (New York: Appleton-Century-Crofts, Inc., 1955).

⁹ Willard B. Spaulding, The Superintendency of Public Schools--An Anxious Profession, The Inglis Lecture (Cambridge, Massachusetts: Harvard University, 1955), p. 173.

decisions is the only control a democratic leader has.¹⁰

The literature covering the decision-making process did not present evidence to support faculty and lay participation in the decision-making process. Because research covered indicated that the validity of a group decision has been questioned, and the current research in group decision does not apply to school situations, the Somers school board felt there should be a definite understanding with the group members that their recommendations for written policy adoption would be given every consideration, and that the groups would have direct representation at the board level, but the Board would reserve the right to make the final decision.

Mechanics of the meetings. It was agreed that during the conduct of these meetings no special effort would be made on the part of the administrator to direct or guide the thinking or expression of the groups. He would, however, act in the capacity as mediator and as a resource person when needed. Here again the groups agreed not only to consider more than one solution, but also to strive for concensus and make recommendations on the basis of the majority.

III. THE QUESTIONNAIRE

The actual work of policy development began with the development and administration of a questionnaire dealing with policy and subordinate policy areas. A questionnaire was developed by the administrator with The Board of Education and Policy Development as a guide.¹¹ The

¹⁰Kimball Wiles, Supervision for Better Schools (New York: Prentice-Hall, 1955), p. 173.

¹¹Max S. Smith and W. Ray Smittle, The Board of Education and Policy Development (Ann Arbor, Michigan: Edward Brothers, 1954), pp. 50-60.

questionnaire was then administered to the Board of Trustees for their consideration and approval. At the direction of the Board, it was then administered to the teachers, and to a community study group.

A summarization of replies to the questionnaire indicated that not even the board members were sure what the policies were in all areas, and that the board members were as willing as others to study and modify their policies and procedures.

There was pronounced agreement that written policies and procedures would be helpful in all areas covered, although some were considered to be of more importance than others. Policies and procedures related to personnel were considered more important to the teaching staff, while those policies and procedures covering use of buildings and equipment were considered most important to board members and lay persons. It should be noted that least importance was attached to the policies and procedures covering those areas considered prime responsibilities of the superintendent such as curriculum, finance, and pupil accounting.

CHAPTER III

DESCRIPTION AND ANALYSIS OF THE POLICY DEVELOPMENT

PROCEDURE IN SOMERS, MONTANA

I. DESCRIPTION

This study is concerned with the analysis and description of a method employed in formulating a cooperatively written school board policy for ~~the~~ Somers Public School. The analysis is based on selected principles and theories from the professional literature. An inseparable part of this study is an attempt to identify any changes of functioning or relationships among the groups concerned during or following the process of forming written policies.

The first step in the policy development process was to formulate a policy classification that would serve the following purposes: (1) serve as a framework for the formulation of written school board policy, (2) serve as a guide for group study and discussion, and (3) as a form of reference for group activities.

The policy classification design was developed by the School Board and superintendent. The design was basically a classification of policies into areas that affected teaching and non-teaching personnel, pupil personnel and pupil accounting, use of school facilities and equipment, administrative, school operational maintenance. A review of the literature related to methods used in the development of written school board policies indicates that there was general agreement on the

acceptance of the method and of the areas of policy classification and development.

Smith and Smittle place some emphasis on the principle that factors of community type and size play an important part in determining policy content but suggest the following areas should be included in the written school policies of any school district:

1. Operating procedures and policies relating to the Board of Education.
2. Policies relating the administrative staff and pupils.
3. Policies relating to the instructional staff.
4. Policies relating to non-instructional personnel.
5. Policies relating to use of building and equipment.
6. Miscellaneous policies.¹

The study and review of related literature necessary to the development of the preliminary policy classification design proved to be valuable to the groups, the Board, and the administrator in the later development of drafts. In reality the review of the literature covered for the discussion groups and school board by the superintendent served as an in-service training program.

The order in which the policy areas were developed seemed to allow the administration to crystallize relationships first. This permitted the administrator to work with the Board more closely in establishing policies to guide the Board.

The criteria for policy adoption as established earlier in the study proved to be valuable tools in the hands of a relatively inexperienced School Board in that it enabled them to act decisively and without undue delay in the evaluation and immediate adoption of proposals and recommendations of the study groups.

¹Max S. Smith and W. Ray Smittle, The Board of Education and Educational Policy Development (Ann Arbor, Michigan: Edward Brothers, 1954), pp. 49-102.

Group selection. Varied principles and methods of lay group selection are advocated in the literature. These principles and methods do seem to fall into two categories, however. On the one hand, there are those who would exercise careful selection and control in forming the groups. That is, they suggest that the group include all known power structures in the community and that the members should represent the total school district, whether parent or non-parent, whether land owner or renter, whether businessman or pensioner. On the other hand, there are those who point up the practical approach; that is, a method best suited to the community-school situation, such as the interest-response method based on a letter sent to school district residents by the superintendent.

The latter method was employed in the Somers study. The high average attendance of this group may be of significance in utility of the method of selection used.

As was pointed out in Chapter II, the Somers lay group was composed of fifteen mothers of children in the school. Insofar as is known, no particular power structure, special interest group or professional level was represented. This seems to imply that the members of the Somers lay group were basically similar in that they wanted to be members of the group for reasons common to all.

Gross, in his discussion of theories of group membership points out that such an implication is a fallacy. He makes clear that to think in terms of "group commonness" of purpose is to invite disaster. The same types and class of people belong to the same groups for vastly different reasons. An individual is more likely to join a group so he can satisfy a specific need, and this need does not have to be the same

as the needs of the other members. He concludes by stating that it is entirely possible that group purpose and individual needs may be simultaneously satisfied.² This suggests that the method of lay group selection employed in the Somers study may prove to be more reliable than there was reason to believe at the time of group selection, however, there is also suggestion here for further research study on the method of group selection in small communities.

The theoretical framework. The use of the theoretical framework in preparation for the adoption of a procedure to be employed as a guide for the discussion groups appears to be a basic step in defining the purpose of the project.

One of the principles commonly reported in establishing group process is that basic to the initiation of any plan is an understanding of the purpose of the plan, and that this can be best accomplished if the groups involved participate in establishing the purpose. This seems to be closely related to another generally accepted principle. The pattern of the plan employed in arriving at a purpose as well as the evolving methods of procedures is not nearly so important as is the fact that the groups have a systematic plan of action in which they have had equal opportunity to participate.

In analyzing the use of these theories in the Somers study, the identity of certain principles of the procedure can be traced to the employment of the above theories. (1) The development of the theoretical framework appears to be the point in the procedure where group

²Neal Gross, Human Relations and the Wishes of Men (Cambridge, Massachusetts: New England School Development Council, 1953), p. 13.

feeling first developed. That is, there seemed to be an awareness of individual responsibilities among the members of the groups, and between the lay group and the teaching staff. (2) For the first time the responsibilities and the purposes of the procedure were clearly defined in terms of time, energy, and importance. (3) This preparational step provided the opportunity for the members of the groups to agree on rules and methods necessary for the achievement of the purpose of the plan.

Implementing the framework. From group discussions a plan was evolved for implementing the framework. The plan included six principles generally accepted in group process techniques and established the pattern used by the groups in the formulation of written policies. The first principle of defining and limiting the problem appeared to give the group a framework within which it could work. The questions used by the groups, (1) What is the problem? (2) How broadly do we look at the problem? (3) What kind of answers shall we seek? seemed to act as a limiting device to the group. In attempting to answer the above questions, the groups were faced with two further questions: (1) How much time do we have? (2) Is this beyond our abilities? The use of the principle of defining and limiting the problem appeared to keep the groups from attempting to do more than was reasonably possible and resulted in efficient use of group time and energy.

There is suggestion here that groups in small communities are by their nature limited as to their numbers, time, facilities, and representative abilities, and that they may use these limitations to advantage.

Determining the group objective. The principle involving the

determination of the group objective seems to lend further emphasis to the constructive use of group time and energy. Lively discussions with overall individual participation were the rule rather than the exception. Of more importance, however, was the fact that some form of group accomplishment was realized at every meeting. There is inference here that the Somers groups placed strong emphasis on the time and energy factors involved in the plan. It may be of further significance to note that the main reason attributed to the disorganization of the Somers Parent Teacher Association in 1955 was that the objectives of that organization were never clarified. A typical meeting of this organization involved arguments over trivial issues carried on by a minority within the group. Time and energies of the group were wasted, and as a result, the group floundered and subsequently disbanded. These factors of wasting time and energy and of not having a purpose or objective have been standing issues with both Somers teachers and lay persons ever since. The result has been a barrier against the establishment of a working relationship between the school and the community.

A conclusion may be drawn here that the use of the principle of determining the objective in the Somers study not only led to the constructive use of the time and energy of the group, but served to reconstruct school-community relationships.

Collection of the evidence. This principle, though a relatively simple one, served an important function. Following a review of the areas of policy development that were to be discussed, the groups expressed the realization that they would need far more data and experience than could be found within the school or the community.

Much of the data collected for this phase of the procedure has since become a permanent part of the school library, and is not only available to the community, but is used as resource material for school board meetings and staff in-service training programs.

It may be concluded that the inclusion of pertinent literature and materials related to the administration and operation of the school in the Somers School Library would lend to the effectiveness of studies involving the use of advisory groups.

Arriving at a solution. Many writers have strongly recommended the principle of group consensus in the process of arriving at group solutions; and that consideration of several solutions may be necessary before a final solution can be reached. In the course of group discussions, the members of the Somers study discovered that problems related to education have many facets. All of which may at the outset seem reasonable. The consideration of employing several solutions to a given problem in the process of formulating policy prompted the group members to give particular attention to the specific needs of the school and community.

The very fact that in most instances several solutions were presented seems to indicate that teaching and lay groups when working in close relationship can be effective as advisory groups.

Use of consultants. The use of consultants in the Somers study not only focused the attention of the groups on the practices and procedures of other school systems and provided for legal guidance and interpretation, but gave the groups a means of comparison and evaluation of the Somers School and community. The employment of this

principle seemed to provide the groups with more of an objective approach to the cooperative development of written policies.

Legal limitations of the groups. Principles and theories involving legal limitation of advisory groups are varied and conflicting. Some authors state that the development of school board policy cannot be delegated by the board to any group. School board meetings are by state law open to the public, and, in their opinion, opportunity for the citizen to have a voice in policy change and development should be carried out as provided for by state law. On the other hand, there are those writers who advocate the inclusion of the teaching staff in policy development and, lastly, there are those who emphasize the use of both teaching and lay groups in policy development. However, all authors on the subject of legal limitations of advisory groups, agree that this is a point that must be clarified in any situation involving the use of groups if group harmony and progress are to be achieved. In the Somers study, the School Board reserved the right to make all final decisions, but somewhat modified this reservation in providing the groups with direct access to the Board. That is, the participants could attend School Board meetings and discuss with the School Board members their proposals and recommendations for changes in policy or, the adoption of new policies. The discussion groups not only approved of this procedure but felt the Board's action was as it should be.

The evidence seems to indicate to the author that the popularly elected school board represents the entire school district while teachers and the lay groups being appointed seem more inclined to represent special interests in both the school and the community.

II. ANALYSIS OF THE PROJECT

Now that the project has been underway for two years and is nearing completion, the question is raised should this be a standing and continuous project which would involve new teachers, lay persons, and board persons, or should the project be considered temporary and disbanded at its completion?

It must be stated that little research has been reviewed as to which method has been most desirable. Giaudrone, in discussing permanent and temporary advisory groups, points out there is agitation for both.³ He says: "On the one hand, it is argued that the school and community should have the benefit of a permanent study group, one which meets periodically to consider those problems which face the school system." This would provide for continuous representation and would include new members, if any. On the other hand, there are those who argue for a temporary study group, selected to study a particular problem and disbanding when a solution has been reached. Each community must make its own decision. One danger of a permanent study group should be pointed out: It could grow to challenge the right of the board to make decisions which differ from those of the study group. This would appear to be a strong argument in favor of the temporary study group.

Observations in the Somers study indicate those persons who had not participated at the beginning of the project, but became members in the second year, assumed comparatively passive roles in the group.

³Angelo Giaudrone, Lay Advisory Committees (Washington: American Association of School Administrators, 1951).

Further, they expressed the opinion that a project of this type should be temporary while the original members favored a continuation.

A significant factor of the cooperative approach used in this study may be that at the time this plan was approved by the School Board, the administration was not faced with pressures or crises that placed them in a compromising or vulnerable position. Recent studies by Davies and Herrold reviewing the purposes for which teachers and lay groups are used in school systems state that such groups when organized for the purposes of harnessing the power of education for the improvement of both school and community may produce unanticipated accomplishments; whereas, such groups organized under adverse conditions where the purpose is marshaling support against attacks on the school, or ax-grinding, may be inviting disaster.⁴ There is strong suggestion here that the effective use of the process as used in this study may depend on the purposes which are related to the conditions at the time of its use.

A further consideration in the analysis of the process was that certain identifiable characteristics of human relations techniques were evident. Griffiths categorizes these characteristics as follows: (1) perception of the administrator, (2) group motivation, (3) power structure within a community, (4) decision making, (5) group dynamics, and (6) leadership.⁵

The implication here is that the human relations techniques employed in the process of this study may be a key method that can

⁴Daniel R. Davies, and Kenneth F. Herrold, Citizens' Committees. (New York City, New York: Ronald Press, 1954).

⁵Daniel E. Griffiths, Human Relations in School Administration (New York: Appleton-Century-Crofts, Inc., 1955).

be applied in the exploration of various administrative and operational problems within the school. This implication is given further emphasis by Sternloff who has pointed out that though the administrator may need certain technical skills in the management of a school, of far more importance is his concept and application of the techniques of human relations in working on a cooperative basis with the school faculty and the community.⁶ The suggested role of human relations techniques, as employed in this study, indicates that application of these techniques in other areas need to be evaluated.

Significant accomplishments. Since the beginning of this study, certain changes have occurred in the school and community of Somers. These accomplishments are:

1. The pressing school building completion program was minutely studied by the lay group. After seeing the need and reviewing the financial problems involved, the group campaigned for community support of the building program. By pooling volunteer resources and efforts, what was for three years an unfinished shell of a building, was completed in three months for twenty-five per cent of the original estimates.

2. A dormant Parent Teacher's Association became active and a major supporting group for the school program.

3. A permanent curriculum study committee was organized for weekly meetings for the coming year. They have selected the process used in this study as a pattern for their meetings.

4. In one instance an organized group which had over a period of years been at odds with the school regarding the use of the school

⁶Francis S. Chase, "The Administrator and Lay Advisory Committees," Administrator's Notebook 5:1-4, May, 1957.

facilities donated needed stage and public address system equipment.

5. The average training of teaching personnel employed in the Somers School system as of May 1, 1957, was three and two-thirds years as compared with two and one-half years at the beginning of the study. Prior to the beginning of the study, the School Board used as criteria for teacher employment: How much will the teacher cost? And can we obtain one with less experience and training for less money? At present, the Board is considering the adoption of a salary budget which would encourage present teaching staff not holding a four-year degree to obtain the same.

6. An organized service club in Somers took over the sponsorship of a landscaping program for the school.

7. An extra-curricular social and square dance program for the pupils of Somers School was organized and supervised by volunteers from the community.

8. Teacher turnover was reduced from forty per cent to twelve per cent.

At this time there is no conclusive evidence that these accomplishments were a direct result of the structures and processes used in this study.

However, each of the foregoing accomplishments appears to be significant in that prior to the beginning of this study, efforts to organize and establish these activities, had, on more than one occasion, met with failure or complacency. It is reasonable to conclude that these accomplishments not only bear out principles and theories covering the functions of teacher and lay discussion groups, but that the purposes ascribed to a cooperative approach in writing school board policies had

been realized to some extent. This conclusion is further substantiated by Lund in his national survey on the values of discussion groups. He states, "That as a consequence of cooperative participation in the study of educational needs many anticipated achievements may be forthcoming."⁷

⁷ John Lund, Educational Leadership in Action (Washington: Department of Health, Education, and Welfare, Office of Education, 1949), p. 2.

CHAPTER IV

SUMMARY

The main object of this study was to describe and analyze the processes employed in the development of a cooperatively written school board policy for Somers, Montana.

The procedure used in the study consisted of three phases:

(1) the establishment of a method, (2) the application of the method, (3) an evaluation and analysis of the process used in the formulation of written policies.

The superintendent initiated the structure of the project. A policy codification design was developed to be used as a framework for the development of written policies, and as a discussion guide for the teaching personnel and the lay group.

The processes involved emphasized group interaction among board members, the superintendent, teaching personnel, and a lay discussion group.

Problems related to the needs of the Somers School system and the community of Somers were reviewed by the groups. Study committees were appointed to review material and make recommendations for policy adoption.

The evaluation and analysis of the process was based on determining suggested areas for further study and research rather than on establishing criteria or methods of developing a cooperatively written policy for Somers School.

Suggested areas for further study and research were: (1) Should the project be continued on a permanent basis so as to include new members of the board, teaching staff and community, or should the project be terminated at the completion of the study for the cooperative development of school board policy at Somers? (2) Is the structure better adapted for use under desirable conditions in the school and community than in situations where there may be a crisis or pressures? (3) Can the process be effectively applied to related phases of school administration and operation where the use of advisory groups would be advantageous?

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POLICIES AND REGULATIONS

of the

BOARD OF EDUCATION

SCHOOL DISTRICT NO. _____

_____, _____

1956-1957

APPENDIX A

INTRODUCTION TO WRITTEN SCHOOL BOARD

POLICY HANDBOOK

FOREWARD

That all those employees, certified and non-certified, of the _____ Board of Education may better understand their duties, responsibilities, and privileges in the Somers School, these policies have been prepared. They set forth the policies and regulations of the local School Board.

As the laws of the state delegate and define the power and authority of local boards of education, the local board, in the following pages, has in turn defined the power and authority it has delegated to those in its employ.

It has been found through experience that a written statement of board policy placed in the hands of all those responsible to the Board of Education has contributed in attaining a higher degree of efficiency in the operation of our schools.

Teachers and lay persons in cooperation with the superintendent contributed the suggestions considered, many of which were integrated into board policy. Published policies of other school systems were examined and some practices observed which seemed appropriate to local conditions were modified and included in the local policy statement.

In the light of past experience the Board will re-examine its policies annually and revise or discontinue those which have been rendered ineffectively by changed conditions, and new policies will be adopted as they are needed in the interest of progress in our schools.

Superintendent of Somers School

SUGGESTED POLICIES AND REGULATIONS FOR SCHOOL BOARDS

There is much evidence to indicate that less than half of the school boards have written and published their policies for the guidance of the employed personnel and the school patrons. Studies have seemed to reveal that written policies have been conspicuous by their absence. Policy making, however, is in operation in all school systems, but is often buried with the passing of time in the board's minute books. Some boards fail to keep official records of their meetings, although in most states such record is required by law.

With the formulation of a cooperatively written set of policies, boards of education are equipped with the means to handle recommendations, procedures, and problems systematically and impartially. Through the printed statement of policy, boards and their employees may move forward with confidence in the execution of their respective duties without fear of infringing on the rights of others.

Faculty members and patrons might beneficially be used in the research stage and to make recommendations. These people, however, should understand their services are requested in an advisory capacity only and that legislative authority is not in any way being delegated to them.

POLICIES AND REGULATIONS

of the

BOARD OF EDUCATION

of

SOMERS, MONTANA

* * * *

BOARD OF EDUCATION

CHAIRMAN

ADMINISTRATION

Superintendent of Somers School

APPENDIX B

WRITTEN SCHOOL BOARD POLICY HANDBOOK

FOR SOMERS PUBLIC SCHOOL DISTRICT

ARTICLE I

SCHOOL BOARD---PHILOSOPHY

Operating Policies Based on a Philosophy of Education. The Board of Education of School District No. 29, Somers, Montana believes that each individual should be accepted into the educational program as he is; that he shall be provided with a stimulating environment and opportunities for learning experiences designed to promote behavioral changes that will effect continuing satisfactory adjustments to life.

In the practical application of this philosophy opportunities shall be provided each individual within the limits of his capacity to:

1. Develop physical, mental, and emotional health.
2. Develop moral and ethical values.
3. Develop an appreciation for his role in the family and in civic groups.
4. Develop skills for effective participation in the democratic processes.
5. Develop the ability to communicate ideas.
6. Develop knowledge and understanding of his natural environment.
7. Develop appreciation of the arts.
8. Develop wise use of leisure time.
9. Develop zeal for continuous learning and self-improvement.¹

Function of the School Board. Three functional activities are recognized in respect to the Board of Education's administering public education within the district.

1. Policy-making. Planning is basic to all activity. Policy making is that function which determines what shall be done, establishes procedures for accomplishing the tasks, selects

¹Max S. Smith and W. Ray Smittle, The Board of Education and Educational Policy Development, Ann Arbor, Michigan: Edward Brothers, 1954.

an executive officer and delegates to him the placing of plans and policies into operation, and provides the financial means for their achievement.

2. Executive. The executive is that function which is concerned with placing into operation the plans and policies, keeping the Board of Education informed and furnishing creative leadership to the board and to the profession.
3. Appraisal. Appraisal is that function which attempts through careful examination and study of facts and conditions to determine: (a) the efficiency of operation of the general activities, and (b) the worth and value of results of the activities in relation to the efficiency and value of instruction.²

The seventeenth Yearbook of the American Association of School Administrators lists the following functions of school boards:

1. Approve the policies and program according to which the board and its professional and other employees shall operate.
2. Adopt a financial budget which has been prepared for its consideration by the superintendent of schools as an executive officer.
3. Approve the plan of organization of the several units to each other.
4. Authorize contracts in payment of bills and other matters which constitute an obligation upon the school district.
5. Submit to the voters for their decision such matters where

²Ibid.

their approval is required by law.

6. Determine salary schedules and procedure for administering them.
7. Consider recommendations of the superintendent of school with reference to matters which he may deem appropriate or which may have been referred to him by the board.
8. Report to the public concerning the conditions of the schools, their progress, and their needs.³

³American Association of School Administrators, Seventeenth Yearbook, (Washington, D. C. 1939). pp. 320-321.

SCHOOL LAWS OF THE STATE OF MONTANA

1949-1953 SUPPLEMENT

Legal Duties: Every school board unless otherwise especially provided by law shall have power and it shall be its duty:

1. To prescribe and enforce rules not inconsistent with law, or those prescribed by the superintendent of public instruction for their own government of schools under their supervision.
2. To employ or discharge teachers, mechanics, or laborers, and to fix and order paid their wages; provided, that no teacher shall be employed except under resolution agreed to by a majority of the board of trustees at a special or regular meeting; nor unless such teacher be the holder of a legal teacher's certificate in full force and effect. All contracts or employment of teachers, authorized by proper resolution of a board of trustees, shall be in writing and executed in duplicate by the chairman and clerk of the board, for the district by the teacher.
3. To determine the rate of tuition of non-resident pupils.
4. To fix the compensation of the clerk.
5. To enforce the rules and regulations of the superintendent of public instruction for the government of schools, pupils, and teachers and to enforce the course of study.
6. To provide for school furniture and for everything needed in the school house or for the use of the school board.

7. To repair and insure school houses and to rent, lease and let to such persons or entities as the board may designate. All rentals shall be paid to the county treasurer for the credit of the school district.
8. To purchase, acquire, sell and dispose of plots or parcels of land to be used as sites for school houses, school dormitories and other school buildings, and for other purposes in connection with the schools in the district; to build, purchase or otherwise acquire school houses, school dormitories and other buildings necessary in the operation of schools of the district, and to sell and dispose of the same; provided, that they shall not build or remove school houses or dormitories, nor purchase, sell or locate school sites unless directed so to do by a majority of the electors of the district voting at an election held in the district for that purpose, and such voting at an election held in the district for that purpose, and such election shall be conducted and votes canvassed in the same manner as at the annual election of school officers, and notice thereof shall be given by the clerk by posting three notices in three public places in the district at least ten days prior to such election, which notices shall specify the time, place and purpose of such election, provided, further, that this subdivision shall not be so construed as to prevent the board of trustees from purchasing one or more options for a school site.
9. To hold in trust for their district all real or personal property for the benefit of the school thereof.

10. To suspend or expel pupils from school who refuse to obey the rules thereof, and to exclude from school, children under six years of age where the interest of the school requires such exclusion.
11. To provide clothing and medical aid for indigent children when it shall be made to appear that such aid is needed; and when deemed advisable to employ a physician or registered nurse to make inspections into sanitary conditions of the school and the general health conditions of each pupil, and to make a full, detailed report to the board of trustees. The clerk of the district shall furnish immediately to each parent or guardian a copy of such portions of the above-mentioned report as pertains to his child or ward.
13. To exclude from school and school libraries all books, tracts, papers, and other publications of immoral and pernicious nature.
14. To require teachers to conform to law.
15. To make an annual report, as required by law, to the county superintendent on or before the first day of August in each year in the manner and form and on the blanks prescribed and furnished by the superintendent of public instruction.
16. To make a report directly to the superintendent of public instruction whenever instructed by him to do so.
17. To determine what branches, if any, in addition to those required by law, shall be taught in any school in the district,

subject to the approval of the county superintendent, in districts of the third class.

18. To visit every school in their district at least once in each term, and to examine carefully into the management, conditions, and needs. This clause applies to each of the trustees.

19.

20. To allow pupils residing in other districts to attend school in the district of which they have charge, if in their judgment there is sufficient room.

21. To procure, by purchase or donation, and to cause to be displayed daily in suitable weather, an American flag, with accompanying necessary fixtures, for each and every school house in their respective districts. Said flags shall be of dimensions not less than four by six feet, and shall be made from durable material. The school trustees are hereby authorized and empowered to use such portion of the school funds as remain in their hands, and which is not otherwise appropriated, for the purchase and erection of fixtures.

22. To close school at their discretion during the annual session of the state teachers' association, and to allow teachers to attend the same without loss of salary.

(As amended by chapter 165, Laws of 1937.)

Sec. 1073. Prevention of communicable disease.

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School boards shall annually send to the public school superintendents and teachers throughout the state printed data and statements which will enable them to comply with the provisions of this chapter.

School boards are hereby required to direct superintendents and teachers to give oral and blackboard instruction, using the data and statements supplied by the state board of health.⁴

⁴School Laws of Montana 1949. State Department of Education, Section 1016, pp. 41-43, and Section 1073, pp. 86-87.

GENERAL FUNCTIONS

1. The duties of the Board of Education shall be conceived as responsibility for:
 - a. interpreting the needs of the community and the requirements of the professional organization;
 - b. developing policies, in accordance with the law and in accordance with the educational need of the people;
 - c. selecting the executive;
 - d. approving means by which professional agents and agencies may make these policies effective;
 - e. furnishing financial means which provide physical and educational accommodations by which organized activity may be carried out;
 - f. appraising the efficiency of the agents and of the service rendered in terms of their value to the community, and
 - g. keeping the people intelligently informed of the purpose, value, conditions, and needs of public educational within the community.
2. The Board of education shall be a deliberate body operating in the best interests of the state and of the children of Somers upon the basis of the best available object evidence. The Board of Education, meeting as a deliberative body, shall require of its executive complete and constant information regarding the state of the schools and the levels of instructional efficiency.
3. The Board of Education shall interpret the needs of the school community upon the basis of objective evidence and all differences of opinion or conflicts arising between members of the Board of Education in respect to policy shall be harmonized in terms of objective evidence based upon the results of scientific research.⁵

Limitations: The Board of Education shall confine its activities to the legislative and appraisal functions except in the selection of a superintendent.

⁵Moehlman, Arthur B. and M. R. Keyworth (editors), Public School Code of the Hamtramck, Michigan Public Schools. (Hamtramck, Michigan: Board of Education, 1927)

BOARD MEETINGS

A school board exists only when it is in session. Members of the board have legal status only when they act in an official board meeting. Failure to follow this principle almost invariably leads to disharmony, confusion and disturbance both on the board and among members of the staff. No member of the board as an individual may command the services of any school employee.⁶

Statement of policy: All school board meetings are open to the public. No legislative action will be taken by the board except on a motion or resolution passed at a regularly called meeting. However, the board may meet privately as a committee-of-the-whole for the purpose of fact-finding or deliberation, BUT NEVER TO LEGISLATE.

1. Board meetings will be held on the third Monday of each month with the exception of April, July, October, and January, when they will be held on the third Saturday.
2. As provided by law, a preliminary budget meeting will be held on the fourth Monday in June of each year.
3. As provided by law, the third Saturday in April of each year shall be an organizational meeting at which time a chairman and a clerk are appointed.
4. A special meeting of the board may be called by the chairman, or any two board members, by giving at least forty-eight (48) hours written notice. Such notice shall specify the purpose for which the special meeting is called.
5. The order of business for all meetings shall be as follows, except that at special meetings, only those items necessary shall be included.
 - a. Call to order. (Chairman)
 - b. Roll call.

⁶Paul R. Mort, Principles of School Administration, (New York: McGraw-Hill Book Company, 1946), 340 pp.

- c. Reading and approval of minutes of previous meeting.
 - d. Communications and petitions.
 - e. Hearing of delegations.
 - f. Report of the Superintendent.
 - g. Unfinished business.
 - h. New business.
 - i. Claims and accounts.
 - j. Adjournment.
6. All action taken by the board shall be so ordered by (1) a motion, or (2) a resolution, duly adopted and/or passed by a majority vote.
 7. The chairman of the board shall preside at all meetings, sign all warrants, and represent the board at all meetings (or appoint someone to serve in this capacity.)

Duties of the school district clerk:

Statement of policy: The clerk is responsible for keeping the official minutes of the board, taking the school census, and for such other duties as prescribed by state law or assigned by the board.

The clerk shall:

1. Attend all meetings of the board.
2. Keep a record of all board business, correspondence, and reports.
3. Keep accurate and detailed accounts of all receipts and expenditures of school monies.
4. Make an exact census of all children and youth residing in the district.
5. Present all bills for auditing at the regular monthly meeting of the board.
6. Prepare and mail notices of all board meetings as directed and in accordance with the law.

Citizen participation. The board of Education shall solicit the advice and counsel of citizens in planning and operating the schools. Meetings of the Board of Education shall be open to the public. All citizen communications to the Board of Education shall be addressed to the Board of Education. Citizens who wish to present any matter of concern to the schools shall make written request to the secretary of the Board of Education at least twenty-four (24) hours prior to the meeting. This shall come under miscellaneous business. The Board may in case of emergency, by majority vote, give visitors who have not presented a written request an opportunity to present problems to the board.

ARTICLE II

GENERAL ADMINISTRATION

The Superintendent. The superintendent of schools is directly responsible to the board for the execution of its policies, rules, and regulations. He is responsible for keeping the board informed about matters of school concern and for advising the board on the formulation of policies, rules, and regulations. The following specific duties are assigned by the board to the superintendent:

- ✓ 1. The superintendent will recommend all teaching and non-teaching personnel for employment in the schools of the district.
2. The superintendent may recommend the discharge of any unsatisfactory employee, either teaching or non-teaching.
3. The superintendent will keep the board informed as to salary trends, sick leave trends, etc., and will recommend salary and sick leave schedules.
4. The superintendent will prepare a budget for the board's consideration and approval.
5. The superintendent will, in accordance with the best possible guidance available, propose major modifications in the educational program of the schools of the district.
6. The superintendent will schedule all classes, assign all teachers, and determine the instructional procedures.
7. The superintendent will provide the board with data concerning needed housing for the educational program of the schools of the district.
8. The superintendent shall direct the guidance and conduct of the pupils of the schools of the district in accordance with state law and the rules and regulations of the district board of trustees.
9. The superintendent shall propose regulations concerning the use of school property and shall carry out any such regulations as may be adopted by the board of trustees.

10. TEACHERS AND SERVICE PERSONNEL

Statement of policy. Teachers, and service personnel (Custodians, bus drivers, clerks, cooks, etc.) are responsible to the superintendent for the effective implementation of board policies, rules, and regulations.

ARTICLE III
PUPIL PERSONNEL

Attendance and behavior:

Statement of policy: The general welfare of all students is best served by regular attendance. Every effort shall be made by the administration and the classroom teachers to see that all students attend, as far as possible, all classes regularly.

Since a part of the finances for the operation of the school is received from the state on the basis of average number of pupils attending school, accurate attendance records are not only required by law, they are necessary to insure that the district receives all of the money to which it is entitled. To this end, the following rules are adopted:

1. Entrance age. Until such time as a uniform entrance age requirement is adopted by either Flathead County or the State of Montana, a child must have reached his sixth birthday on or before October 15th of the year he is to enter the first grade.
2. Compulsory attendance. All children between the ages of eight and sixteen years are required by law to attend school. Work permits may, however, be issued in certain cases to children fourteen years of age and over. Other unusual cases may be excused from attendance in accordance with the law.
3. Absence from the school grounds. No pupil is permitted to leave the school grounds once he has arrived at school without permission from the school office. Parents desiring their children to leave the school grounds for any reason, should request permission by writing a note stating the circumstances under which the child is to leave.

Statement of policy (non-resident.) The Board of Trustees believes that each child should attend elementary school in his home district. However, recognizing that unusual situations arise, the Board will accept students from outside districts under certain conditions.

To this end, the following rules are adopted:

1. No one connected with the Somers Elementary School, or School District No. 29, is to solicit the attendance of pupils living outside the district.
2. Parents must apply by submitting application to attend Somers Elementary School which may be obtained from the Superintendent's office.
3. Such application shall contain (1) a request from the parents for such attendance, (2) an endorsement from School District No. 29 accepting such student, (3) an endorsement containing the approval of the County Superintendent of Schools.
4. Tuition in the amount allowed by law shall be charged at the discretion of the Board of Trustees, School District No. 29.
5. Outside district students so accepted shall be permitted to ride school busses.
6. Preference shall always be accorded students from School District No. 29 over outside district students in the matter of space and convenience.
7. Applications shall be filed with the Superintendent of the School before June 25 preceeding the year of attendance wherever possible.

Statement of policy (safety). The safety of the students of the Somers School takes precedence over all other factors connected with the education of Somers students. To this end, the following rules are adopted:

1. Teachers are responsible for the safety of students in their charge.
2. Unsafe conditions and/or practices shall be reported to the superintendent immediately.
3. All teachers shall teach safety and safe methods for all activities before entering into such activities.
4. Safe pedestrian practices shall be taught frequently in the elementary school. This applies particularly to walking on the highway, the use of bicycles, leaving and entering school busses.

5. Each teacher shall periodically instruct students as to the proper exit and manner of leaving the building in case of fire. Fire drills shall be conducted throughout the school year.
6. School bus drivers are responsible for the safety of all pupils riding their bus. All drivers shall be guided by the Montana School Bus Driver Manual and all existing laws concerning the transportation of pupils. Any violation of school bus safety rules is to be reported to the superintendent of the school immediately.
7. All accidents are to be reported on a standard student accident form as soon as possible after an accident occurs. These forms may be obtained from the superintendent's office.
8. No students are to be allowed in the gymnasium without proper supervision.
9. No students are to be in the school building outside of the regular school hours without proper supervision.

Behavior.

1. All pupils who may be attending public schools shall comply with the regulations established in pursuance of law for the government of such schools, shall pursue the required course of study, and shall submit to the authority of the teachers of such schools. Continued and wilful disobedience and open defiance of the authority of the teacher shall constitute good cause for expulsion from school. Any pupil who shall, in any way, cut, deface or otherwise injure any schoolhouse, furniture, fences, or outbuilding thereof, or any book belonging to other pupils, or any book belonging to the district library, shall be liable to suspension and punishment, and the parent or guardian of such pupil shall be liable for damages, on complaint of the teacher or any trustee and upon proof of the same. (School Laws of the State of Montana, 1949, Chapter 105, Section 1133, p. 102).

ARTICLE IV

GENERAL PERSONNEL POLICIES

Statement of policy. The Board will seek to employ the best qualified people available at salaries or wages high enough to attract competent people. At the same time, the Board will demand a professional job and quality workmanship from the personnel hired. To this end, the following rules are adopted:

1. All positions shall be filled by the best qualified persons available.
2. Salaries are determined by the Board of Trustees.
3. Marital status will not be a deciding factor for any position.
4. Religion shall not be a factor in selection of any person for any position.
5. Character will be considered in all applications.
6. All certificated personnel shall be paid on the basis of the district salary schedule as adopted by the Board of Trustees. Salaries shall be paid according to the time set by the contract for teachers.
7. Salaries will be paid the first business day of each calendar month for services performed during the past month. Exceptions to the above may be made by the school district clerk.
8. All cases of suspension and termination of contract shall be in accordance with the School Laws of the State of Montana. Written notice will be served by the first day of April where services are no longer required, or desired, by the Board.

CERTIFICATED PERSONNEL

Statement of policy. All positions requiring certification shall be certified in accordance with the requirements of the State Department of Public Instruction and the laws of the State of Montana. The Board believes that conditions of employments should be made known to all employees. To this end, the following rules are adopted:

1. All applications for certified positions shall be presented to the superintendent in writing. Without exception a personal interview is required of all applicants.
2. Every teacher shall have power to hold every pupil to a strict accountability in school for any disorderly conduct on the way to or from school, or during intermission or recess.
3. It shall be the duty of the teacher to exercise due diligence in the care of the school grounds and buildings, furniture, apparatus, books, and supplies.
4. Teachers are expected to be at their place of employment one-half hour before school classes begin. They are also expected to remain one hour after classes are dismissed three nights a week.
5. Activities of co-curricular nature are a part of the educational system and all teachers will aid in such activities.
6. Supervision of playground and corridors is expected of all teachers.
7. The first duty of the teacher is the welfare of the children.
8. It shall be the policy of the Board of Trustees to require every teacher to attend summer school at least one summer every five years.
9. Teachers will observe the Code of Ethics of the National Education Association.
10. Teachers will be directly responsible to the Superintendent.
11. Discipline shall be positive. Guidance and self-discipline shall be encouraged.
12. Discipline cases will be handled, except in rare instances, by the classroom teacher.
13. Insubordination is not to be tolerated in any instance.
14. Corporal punishment by the teacher is not a policy of the Somers Public School.

Community relationships. Teachers will adhere to:

1. Teachers will adhere to any reasonable pattern of behavior accepted by the community for professional persons.
2. Teachers will perform the duties of citizenship and participate in community activities with due consideration for his obligations to his students, his family, and himself.

3. Teachers will discuss controversial issues from an objective point of view, thereby keeping their class free from partisan opinions.
4. Teachers will respect the community in which they are employed and be loyal to the school system, community, state, and nation.

Staff relationships.

1. Teachers will speak constructively of other teachers, but report honestly to responsible persons in matters involving the welfare of students, the school system, and the profession.
2. Teachers will conduct all professional business through proper channels. (Teacher to Superintendent to Board).
3. Teachers will refrain from discussing confidential and official information with unauthorized persons.

NON-CERTIFIED PERSONNEL

Statement of policy. The purpose of the school is for the education of students. All non-certificated personnel are employed to provide services which, directly or indirectly, benefit the students of the Somers School. To this end, the following rules are adopted:

Custodians.

1. Custodians shall be hired by the board on recommendation by the Superintendent.
2. The term of employment shall be from July first to July first of the following year.
3. The custodians are directly responsible to the superintendent.
4. The primary concern of the custodians shall be the safety and general welfare of the children of the Somers Public School.
5. The custodians shall remain in or about the buildings during the assigned hours, except when it is necessary for them to be absent for good reasons. Any absence from their posts must be reported, before leaving, to the superintendent.

6. Custodians will see that proper temperatures are maintained during school hours and for all activities.
7. The purchase of custodial supplies will be made through the office of the Superintendent, upon recommendation of the custodians.
8. Custodians shall assist the Superintendent and teachers in maintaining order in the halls and on the school grounds.
9. They shall go on errands as may be required of them by the superintendent.
10. Principles of good housekeeping shall be observed at all times.

Cooks

1. All cooks shall be hired on recommendation of the Superintendent, by the School Board.
2. They shall be hired for the school term.
3. There shall be one head cook. Assistants are under the immediate supervision of the head cook.
4. The head cook shall be consulted in the employment of the assistants.
5. The preparation of the school lunch and the general supervision of the kitchen and lunchroom are the direct responsibility of the head cook.

Bus Drivers.

1. Bus drivers shall be hired on recommendation of the Superintendent by the School Board.
2. The primary concern of the bus driver shall be the welfare of the children of the Somers Public School.
3. All bus drivers are expected to see that all safety measures are enforced at all times.
4. Regular schedules are to be prepared and followed at all times.
5. Children shall be required to follow strictly rules of conduct while being transported. Bus driver will be responsible for discipline on the busses.

ARTICLE V

SCHOOL PLANT AND EQUIPMENT

USE OF BUILDINGS

Statement of policy. The Board recognizes that the buildings of the district have been erected for the primary purpose of educating youth. In any use of district buildings, the needs of the youth of the community will be served first. To this end, the following rules are adopted pertaining to the use of school buildings by outside agencies:

1. Adult groups may use the buildings when it does not interfere with the primary purpose.
2. Community groups have the use of the buildings free of charge if no admission is charged and the public is invited. Groups not inviting the public shall be charged five dollars.
3. Community groups may have the use of the building for a fee of fifteen dollars if an admission is charged.
4. No individual may rent the building for individual profit.
5. Groups desiring to use the building for the raising of funds for charitable purposes shall present their case to the Board of Trustees for final action.
6. Student organizations shall have free use of the building but must make arrangements with the Superintendent through their sponsor.
7. Where a charge is made for the use of the building the janitor shall be paid seven dollars and fifty cents by the group or organization renting the building.
8. All applications for the use of the building shall be reviewed by the Board of Trustees.
9. School equipment and tools may be loaned to responsible persons if such equipment and tools are not available from commercial firms in the district.
10. All loaned equipment of every kind shall be recorded and the borrower assumes full responsibility for the return of the equipment or tool in as good a condition as when borrowed.

11. All religious groups desiring to use the facilities of the school must be approved by the Kalispell Ministerial Association.
12. The rentee or group using the building must assume full responsibility for any unwarranted destruction of property.
13. Groups using the building free of charge would be expected to leave the building as it was found.
14. The use of alcoholic beverages on school property or in any school building is forbidden.

ARTICLE VI

SCHOOL PROGRAM, SERVICES, BOOKS AND MATERIALS

CURRICULUM

Statement of policy. The Board recognizes the need for a curriculum which will help each child to develop his potentialities to the fullest possible extent. The Board also recognizes the limitations imposed by the inadequate financial base of the District, the limited number of classrooms and facilities, and the tremendous task which the public schools of America face. The Board is devoted to the idea of doing the best it can with the facilities it has. To this end, the following rules are adopted:

1. Curriculum. The curriculum of the elementary school shall be so regulated as to provide the major emphasis on basic subjects, with as much emphasis on fringe areas as time and facilities permit.

AUTHORIZED SERVICES

Statement of policy. The Board recognizes that certain services are necessary to the complete education of the students. To this end, the following rules are adopted:

1. Insurance. A special school child accident insurance policy shall be made available to parents who desire such coverage at no cost to the school district. The School Board authorizes such a policy to be made available but does not sell such policy. No one connected with School District No. 29 is permitted to act as agent for any such insurance company, to accept money for the sale of such insurance policies, or otherwise benefit from the sale of such policies. The services of school personnel is offered as a convenience to parents only.
2. Transportation. Bus transportation shall be furnished all students in accordance with the laws of the State of Montana regarding school transportation. The use and reimbursement of individual cars for incidental transportation shall be according to the following rules:

- A. The use of individual cars for transporting school personnel (students or teachers) shall be restricted to the following:
 1. Transporting to and from school sponsored inter-scholastic activities. (Participants only.)
 2. Transporting to and from educational activities approved by the Board of Trustees.
 3. Transporting to and from workshops, educational organization meetings (i.e. Montana School Boards Association annual meeting, Montana Association of School Administrators annual meeting, State Department of Public Instruction annual meeting, etc.)
 4. Transporting to and from any official school business (i.e. trips to County Superintendent's office, banking in Kalispell, etc.)
- B. Any individual car used in the transportation of students shall be insured for liability.
- C. The reimbursement of official trips is made at the rate of eight cents (.08) per mile.
- D. An expense account report will be filed with the school clerk as soon as possible upon returning from any official trip. Vouchers to cover costs will also be filed with the report.

BOOKS AND MATERIALS

Statement of policy. The selection of all books and materials for use in the Somers School shall be made with a view toward providing a necessary service, a view toward economy, and a view toward quality. All books and materials shall be free from objectionable propaganda; to this end, the following rules are adopted:

1. All purchasing shall be done in accordance with the laws of the State of Montana.
2. As far as possible, bids and/or quotations from several sources shall be obtained before purchasing any items.
3. Whenever the opportunity presents itself, cooperative purchasing with other school districts shall be entered into.

4. The selection of all books and materials shall be of such nature that the curriculum is continuous throughout the grades.

APPENDIX C

THE QUESTIONNAIRE

THE QUESTIONNAIRE

Are you familiar with Somers School Board Policies in the following areas? If your answer is yes, and you feel the need for the change of a policy, or for the adoption of a new policy, please indicate by placing a check in the need column.

GENERAL POLICY AREAS

YES NO NEED

School Board Procedure

Board philosophy

Functions of School Board

Legal duties

General Administration

Duties of Superintendent

Pupil Personnel

Entrance Age

Compulsory attendance

Absence from school

Non-resident pupils

Safety regulations

Behavior and discipline

General Personnel

Teacher employment

Certificated personnel

Community relationships

Staff relationships

Non-certificated personnel

GENERAL POLICY AREAS

YES NO NEED

Use of School and Equipment

Use by community groups

Use by groups outside community

Use by religious groups

Who shall be charged

Who shall not be charged