



## POLICY 1.036

4-A I recommend that the Board adopt the proposed **new** Policy 1.036, entitled “School Board Member Constituents’ Service.”

[Contact: Larry Padgett, PX 48830.]

### Adoption

### CONSENT ITEM

- The Board approved development of this revised Policy at the development reading on December 8, 2010.
- The purpose of the policy is to outline a process for tracking, documenting, and responding to Board member constituents.
- The proposed constituent tracking system will feature:
  - A protocol for handling constituent requests for information or assistance
  - A Board Liaison who will enter and document constituent requests received and will enter and track the resolution of requests and notify the Board Member(s).
  - A Constituent Tracking System that will store, track, categorize, and analyze requests and is capable of creating periodic reports that will be provided to the Superintendent and Board Members on the overall usage of the tracking system to show numbers of requests, types of requests, and overall summary of usage. Confidential or exempt information will not be disclosed or tracked in the system.
- This policy will also establish a protocol for managing constituent requests and guidelines for responding to requests.
- Based on Board Member discussion during the first reading the following changes were made to the Policy by Information Technology:
  - Section 2ciii was revised to reflect the Constituent Tracking System will send information to **All** Board Members.
  - Section 2civ was revised to reflect the Constituent Tracking System is searchable.
  - Section 2cv was added to reflect the Constituent Tracking System will be accessible by Board Members in a secure fashion.

- Section 3a was revised to reflect that all Board Members will be included in the communications.
- The Chart was revised to reflect that all Board Members are included in the communications i.e. “Board Member” was changed to “Board Members”.

**POLICY 1.036**

**SCHOOL BOARD MEMBER CONSTITUENTS' SERVICE**

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3 1. **Purpose:**

4 The purpose of the policy is to outline a process for tracking, documenting, and  
5 responding to Board member constituents.

6 2. **System for Constituent Service:**

7 a. Recognizing the need to provide quality service to constituents, the Palm  
8 Beach County School Board and Superintendent will utilize the Constituent  
9 ticketing system for tracking and responding to constituent inquiries.

10 b. The goal of the District is to respond promptly and professionally to questions  
11 or concerns of the public. To this end, the public is invited to use published  
12 telephone numbers to contact the appropriate District personnel regarding  
13 issues or questions. Another valuable resource is the District website  
14 [www.palmbeachschools.org](http://www.palmbeachschools.org) which contains District policies, procedures, and  
15 the status of various ongoing programs that will often answer many questions.  
16 Constituents may get in touch with the respective Board member directly by  
17 contacting the Board Office. If a Board member receives a direct inquiry from a  
18 constituent, the member is encouraged to forward the request to the Board  
19 office for use of the tracking system.

20 c. A Board office contact person will serve as the Board Liaison for such  
21 constituent inquiries, as appropriate. These inquiries will be tracked using the  
22 Constituent Tracking system with the following features:

23 i. A protocol for handling constituent requests for information or assistance;

24 ii. A primary contact person, the Board Liaison, will, as needed, enter and  
25 document constituent request received;

26 iii. The Board Liaison will enter and track the resolution of requests and the  
27 system will notify ~~the appropriate~~ all Board Member(s);

28 iv. The Constituent Tracking System will be searchable and will store, track,  
29 categorize, and analyze requests;

30 v. The system will be accessible by all Board Members via its secure web  
31 based interface;

32 vi. Periodic reports will be provided to the Superintendent and Board  
33 Members on the overall usage of the tracking system to show numbers of

34 requests, types of requests, and overall summary of usage. Confidential  
35 or exempt information will not be disclosed or tracked in the system; and,

36 vii. Oversight of the system by the Superintendent's designee.

37 d. The attached flowchart tracks the process flow for constituent service  
38 requests.

39 **3. Protocol for Managing Constituent Requests:**

40 a. Protocol is based on a reliable information network between the Board Office  
41 and the Senior Leadership for referring, tracking and resolving constituent  
42 inquiries. Normally, electronic management of these requests will be done via  
43 email or other electronic means as the preferred method of communication  
44 and recordkeeping in the system. The Board Liaison(s) will manage inquiries  
45 using the tracking system and coordinate responses with appropriate District  
46 staff. Requests will be tracked in the Constituent Tracking System by category  
47 type of request, priority of request; the person assigned the lead for  
48 responding, the date of inquiry and the date of response. This information will  
49 be maintained in a consolidated database until reviewed by the  
50 Superintendent or the Board, but no less than three years or any additional  
51 time per the District's records retention schedule or a records hold. The  
52 District response will be forwarded to the Board Liaison for response to the  
53 constituent. The Board Liaison is responsible for ensuring that the **respective**  
54 Board member s **are is** advised of action on the constituent requests.

55 b. As appropriate, and when requested by the Board Office, the Superintendent's  
56 Office or appropriate District staff member may respond directly to the  
57 constituent and copy the Board Office on the response. This shall be noted in  
58 the tracking system maintained by the Board Office.

59 **4. Guidelines for Responding to Constituent Requests:**

60 Response to constituent requests will be managed on a priority basis. Board  
61 Liaison and District staff will set priorities considering all requests. The priority in  
62 which requests are answered is based on the urgency of the specific issue and not  
63 the importance of each request. The Board considers all requests to be important  
64 and warranting an expedient response. In cases where extensive staff work is  
65 required to collect data or research information to respond, an interim response will  
66 be provided to the constituent by the Board office.

67 **5. Central Database Management:**

68 Constituent request data will be managed by the Board Liaison(s). As described in  
69 the section of this policy titled "**Protocol for Managing Constituent Requests**",  
70 statistics will be collated for further review by the Superintendent. Constituent

71 responses shall be maintained in an electronic database for three years or any  
72 additional time per the District's records retention schedule or a records hold.

73 **6. Reporting and System Improvement:**

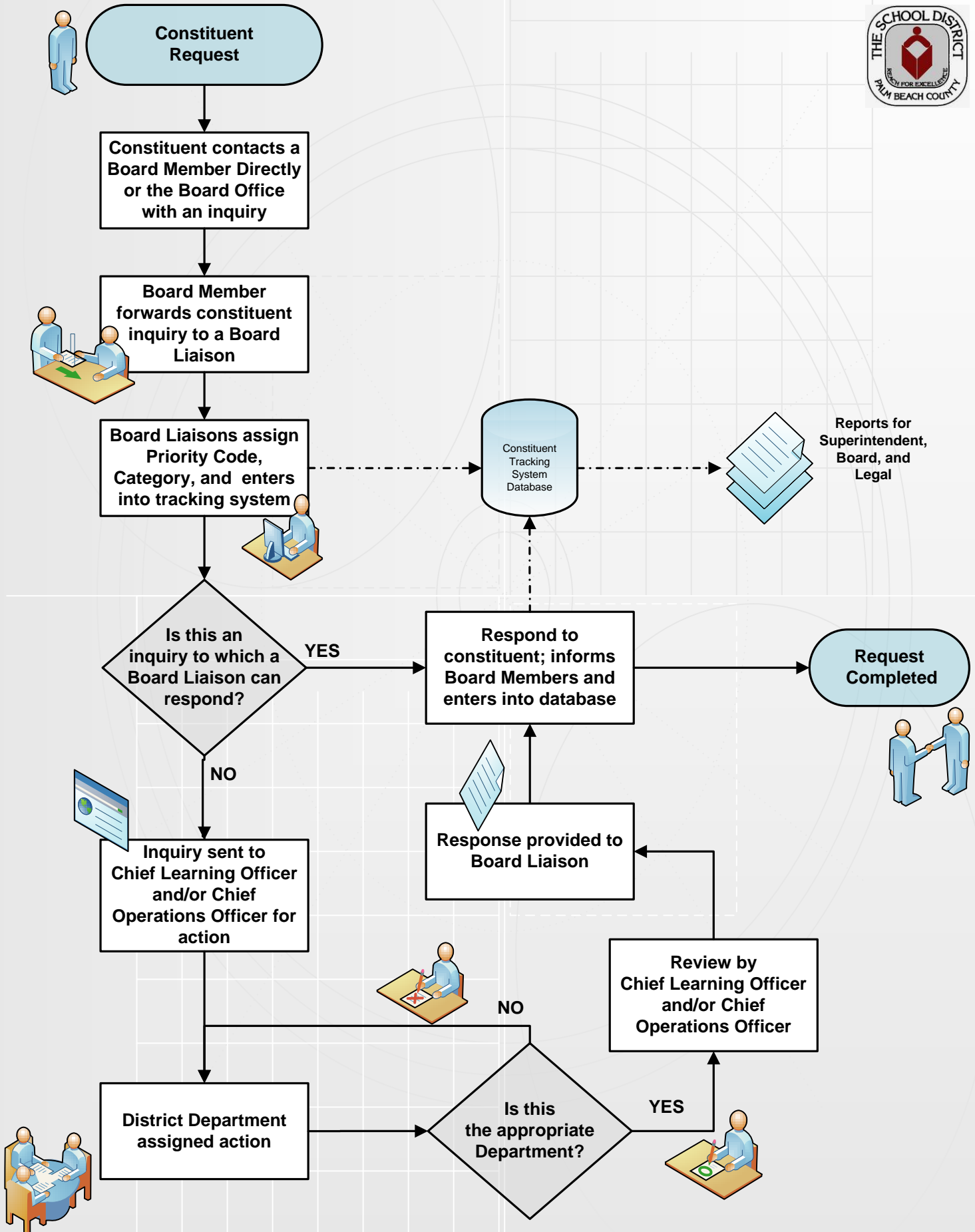
74 On a regular schedule, or as directed by the Board Chair, the Superintendent will  
75 present a summary to the Board, which will include constituent request data,  
76 category trends, priority ranking and meantime measures of response. The  
77 Superintendent's report to the Board will be in a suitable electronic document and  
78 will include data and graphs portraying the results and processes involved. This  
79 report will contain the most current information, and will also include comparative  
80 data and trend analyses.

81 STATUTORY AUTHORITY: Fla. Stat. §§ 1001.32(2); 1001.41 (2); 1001.42 (25)

82 LAWS IMPLEMENTED: Fla. Stat. §§ 1001.32(2); 1001.42 (17); 1001.43 (5) & (10)

83 HISTORY: \_\_/\_\_\_2011

# School Board Policy 1.036 -School Board Member Constituents' Service



Legal Signoff:

The Legal Department has reviewed proposed Policy 1.036 and finds it legally sufficient for adoption by the Board.

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Attorney

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Date