



### **POLICY 1.036**

**5-A** I recommend that the Board approve development of the proposed **new** Policy 1.036, entitled "School Board Member Constituents' Service."

[Contact: Larry Padgett, PX 48830.]

#### **Development**

#### **CONSENT ITEM**

- 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 request received and will enter and track the resolution of requests and notify the appropriate 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.

**POLICY 1.036**

**SCHOOL BOARD MEMBER CONSTITUENTS' SERVICE**

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2  
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  
27 notify the appropriate Board Member(s);
- 28 iv. The Constituent Tracking System will store, track, categorize, and  
29 analyze requests;
- 30 v. Periodic reports will be provided to the Superintendent and Board  
31 Members on the overall usage of the tracking system to show numbers of  
32 request, types of requests, and overall summary of usage. Confidential or  
33 exempt information will not be disclosed or tracked in the system; and,

- 34 vi. Oversight of the system by the Superintendent's designee.
- 35 d. The attached flowchart tracks the process flow for constituent service  
36 requests.

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

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

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

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

65 **5. Central Database Management:**

66 Constituent request data will be managed by the Board Liaison(s). As described in  
67 the section of this policy titled "***Protocol for Managing Constituent Requests***",  
68 statistics will be collated for further review by the Superintendent. Constituent  
69 responses shall be maintained in an electronic database for three years or any  
70 additional time per the District's records retention schedule or a records hold.

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

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

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

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

81 HISTORY: \_\_/\_\_\_2010

Legal Signoff:

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

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Attorney

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Date

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

