

# The Wide World of Web-Based Policy Platforms

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## Pennsylvania School Boards Association

- Web-based Policy Platform
  - Initiated in 2014 with BoardDocs
  - Full transition from Microsoft Word to Web-based platform – not optional
    - No additional annual fee
    - Incorporated as part of the standard PSBA Policy Service
    - One user name and password per school entity



## Pennsylvania School Boards Association

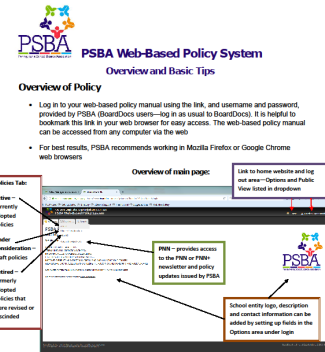
- Conversion process – time consuming
  - Contacted school entities to ensure we had most current information
  - Sent to BoardDocs to run conversion program
  - Hired temporary staff – format and add links to legal citations
  - Staff and member training
    - Trained each school entity after conversion was complete
    - Additional standard monthly web-based trainings
  - Resource materials
    - Recorded web-based training session



# Pennsylvania School Boards Association

## Resources:

- Workflows and YouTube
  - Overview and Basic Tips
  - Printing problems
  - Policy News Network (PNN)
  - Editing Own
  - Creating New
  - Activating a Policy



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# Pennsylvania School Boards Association

## [Web-based Policy System Demonstration](#)



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## Georgia School Boards Association

- Started ePolicy in 1997
- eBoard developed in-house in conjunction with Apple
- Conversions were time-consuming and a learning curve
- Consultant brought on to get the first districts' manuals done
- Training developed using GoToMeeting



## Georgia School Boards Association

- Challenges
  - Updates to system require communication and training
    - Online support system
    - "Help" section
    - People mostly prefer to call
  - Staff turnover in districts require frequent training and communication
    - New superintendent communication
  - Expectations that it will work just like Word
    - Offer enhanced maintenance so staff member puts new policies in, makes changes and handles formatting



## Georgia School Boards Association

- Codification is same for districts and State Board
- Customer favorites
  - Legal and State Board links
  - Search engine
  - Print the manual or the table of contents
  - Archiving policy publications on their work in progress page



## Georgia School Boards Association



## North Carolina School Boards Association

- Policies to Lead the Schools (PLS) is NCSBA's online policy manual.
- The notebook version of the PLS manual was created in the early 1990s and went online between 1999 and 2000 using MicroScribe as the webhosting vendor.
- PLS manual has about 315 policies.
- Focus of the manual: legal compliance.
  - PLS Update Service (Cost: \$1,500—for FY 2017-2018)
  - Customized PLS Update Service (Cost: \$6,200—for FY 2017-2018)(this service is offered to school systems that have completed a custom policy manual project with NCSBA)

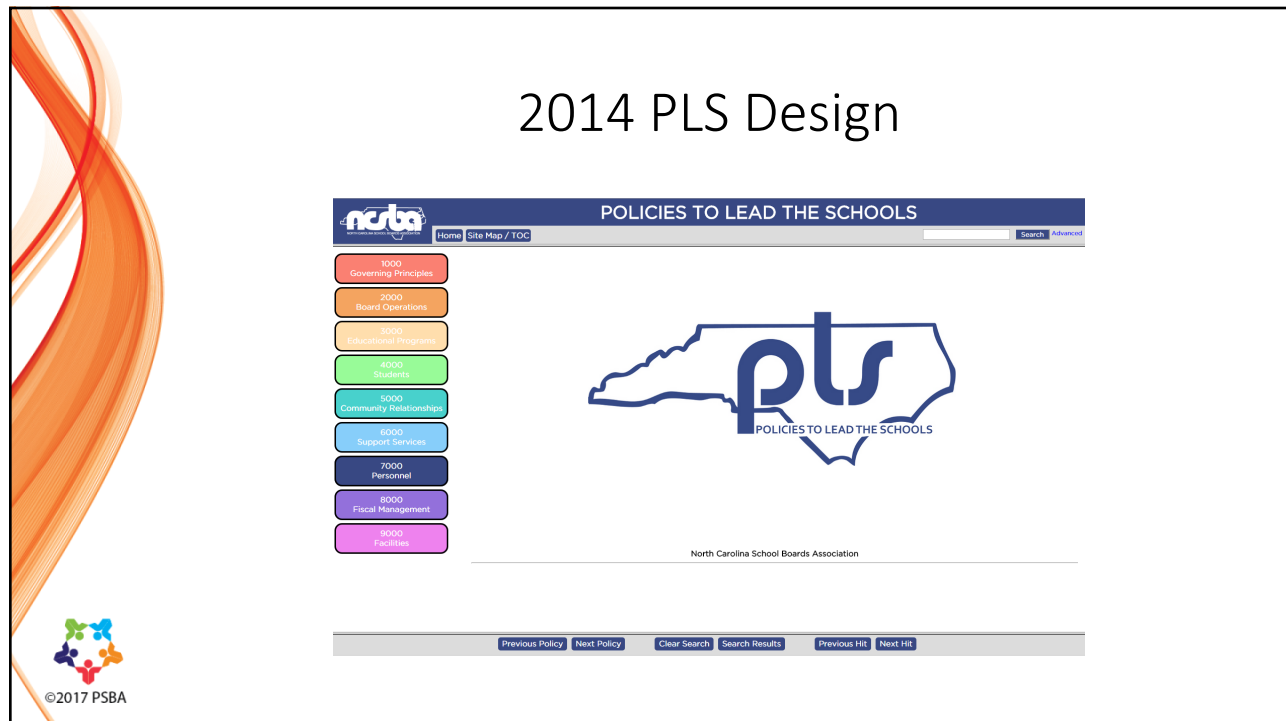


## Design Features of PLS

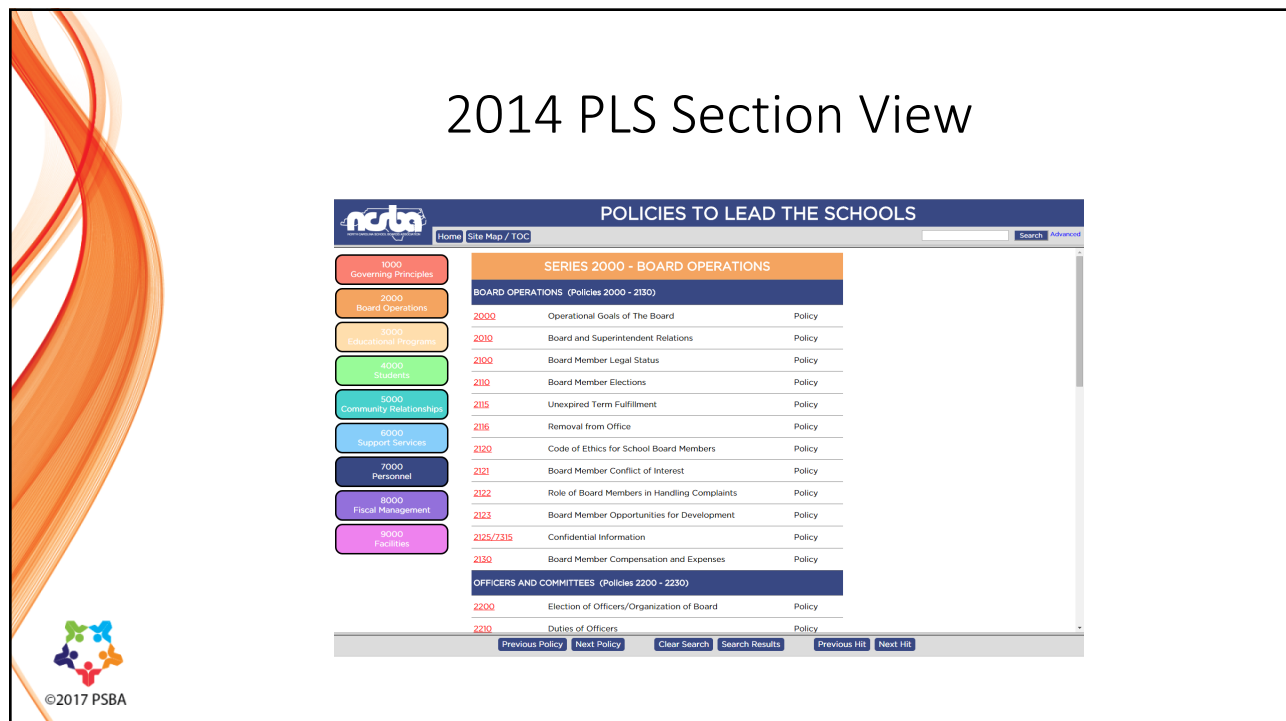
- In 2014, NCSBA, working with MicroScribe, redesigned the PLS online manual.
  - We spent “hours” working together and with MicroScribe to come up with the current design. We worked on every detail all the way down to fonts and color schemes.
- The purpose of the 2014 redesign was to give PLS a more user-friendly, readable, up-to-date look.
- The new design retained existing features:
  - Search function
  - Links to statutes and other legal citations
  - Links to cross references
  - Footnotes



## 2014 PLS Design

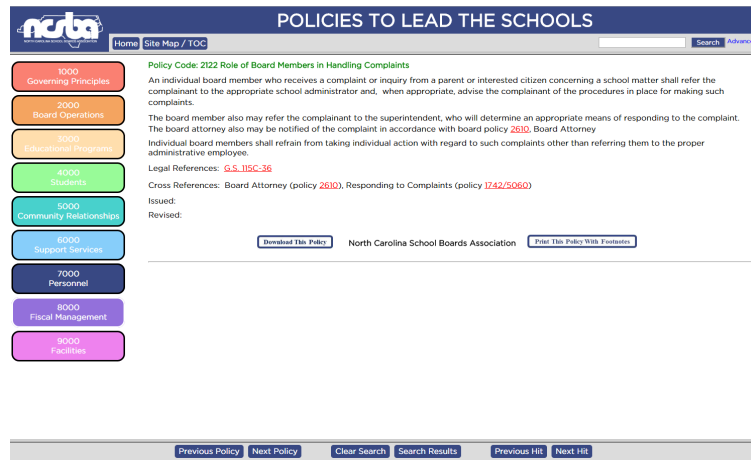


## 2014 PLS Section View





## 2014 PLS Policy View



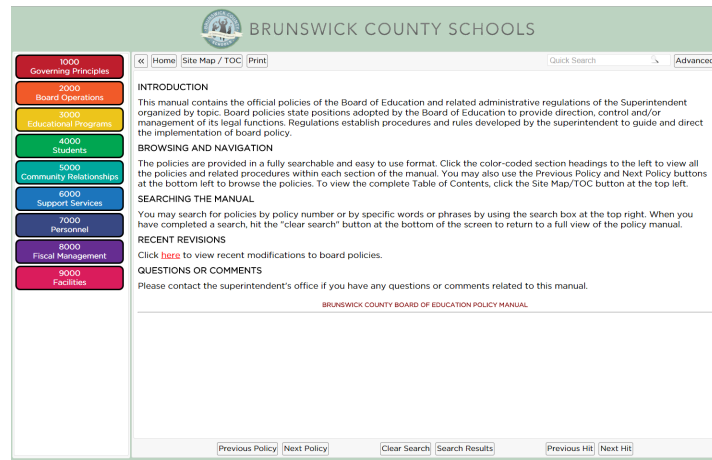
## Webhosting Local Board Policy Manuals

- NCSBA offers a board policy manual webhosting service using MicroScribe. Sixty-four of 115 NC school systems use this service.
- Most school systems that don't use NCSBA webhosting post their policy manuals using their own technology resources. Several school systems have contracts with BoardDocs.
- In 2015-2016, after redesigning our PLS manual, we had our online webhosting customers upgrade to one of three new policy manual looks.
  - Two of the options were based on the new PLS design. If a school system wanted to upgrade to one of these options, there was a one-time additional development fee (\$1,250-\$1,600).
  - The third option, developed by MicroScribe, was available at no extra charge to the school system.
  - One of our priorities was to offer a "no-cost" upgrade option and to keep the upgrade fee as low as possible.

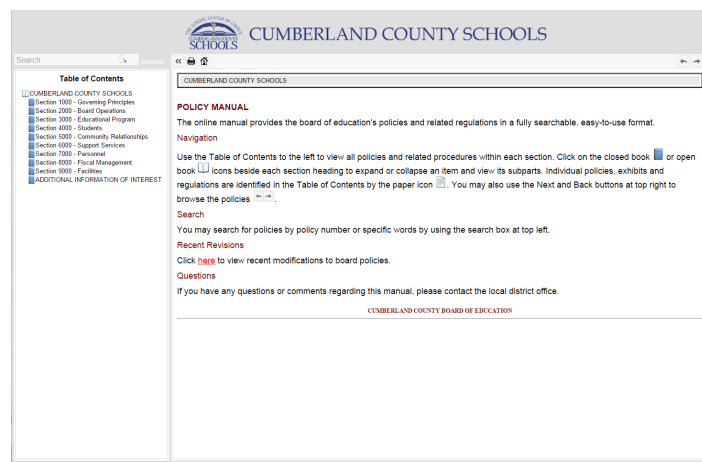




## Online Webhosting Options #1 and #2



## Online Webhosting Option #3



## Transition Process

- We developed a schedule for transitioning two or three school systems at a time over an 8 month period of time. We sent emails to each school system explaining the upgrade and their options.
- The bulk of the work was handled by one of our administrative assistants.
  - She contacted each school system to determine what design they wanted to choose.
  - If an invoice was involved, she sent the invoice.
  - After the invoice was paid, or if the free option was selected, she communicated with MicroScribe with regard to developing the new site.
  - She “checked” each site to make sure there were no problems with the new site.
  - Once the new site was developed the school system was provided with the new link to their policy manual site.



## 2017 Transition to a New Server

- Beginning in January 2017 we worked with MicroScribe to transition all the online webhosted policy manuals to a new server. At the same time, MicroScribe switched to new software to support the online webhosting service.
- This transition was done at no charge to the local school system.
- We used the same strategy as in 2016: that of switching a few school systems at a time over a period of 4 months.



## Successes and Challenges

- Successes!

- We are pleased that the changes implemented in the past 3 years have been accomplished without major disruptions to our policy services.
- We are pleased that we are able to offer subscribing NC school systems access to our PLS model policy manual and our online webhosting service for a very low cost relative to the value they receive in terms of updated legal policies and an efficient online webhosting service.

- Challenges!

- We have had to work on some problems with our search engine.
- We are currently working on some website accessibility issues.



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