

Board Policy Update Instructions

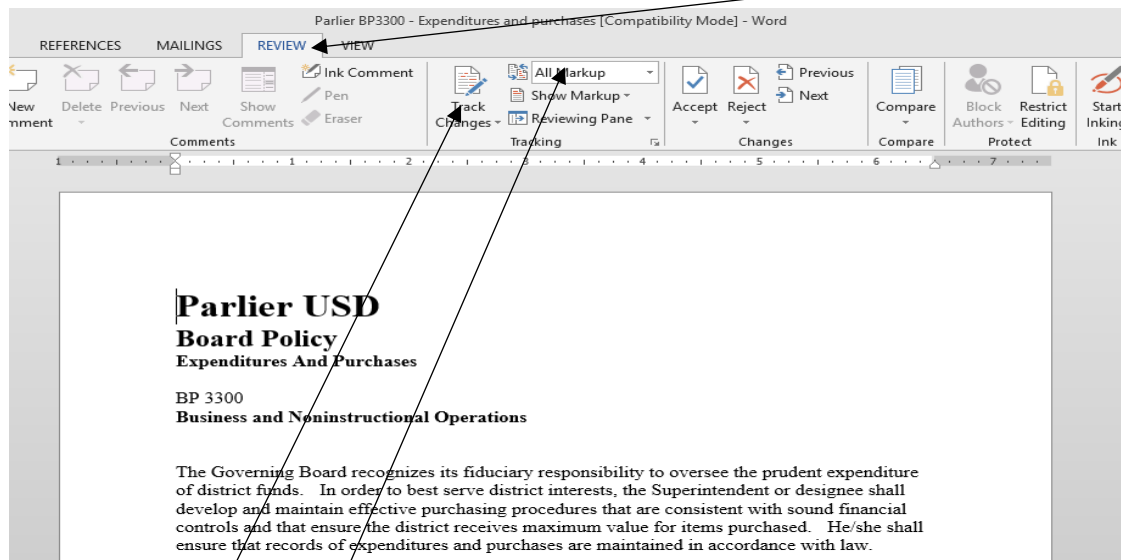
Board policies need to be revised on a regular basis and presented to the Board so that policies are compliant with changes in the law. CSBA provides policy updates quarterly and they will be sent out by Gloria for your attention. Policy revisions, generally, take two meetings to accomplish. Prompt attention to updates will help from keeping you buried.

What you need:

- 1) WORD copy of the current board policy
- 2) WORD copy of the CSBA updated version with notes

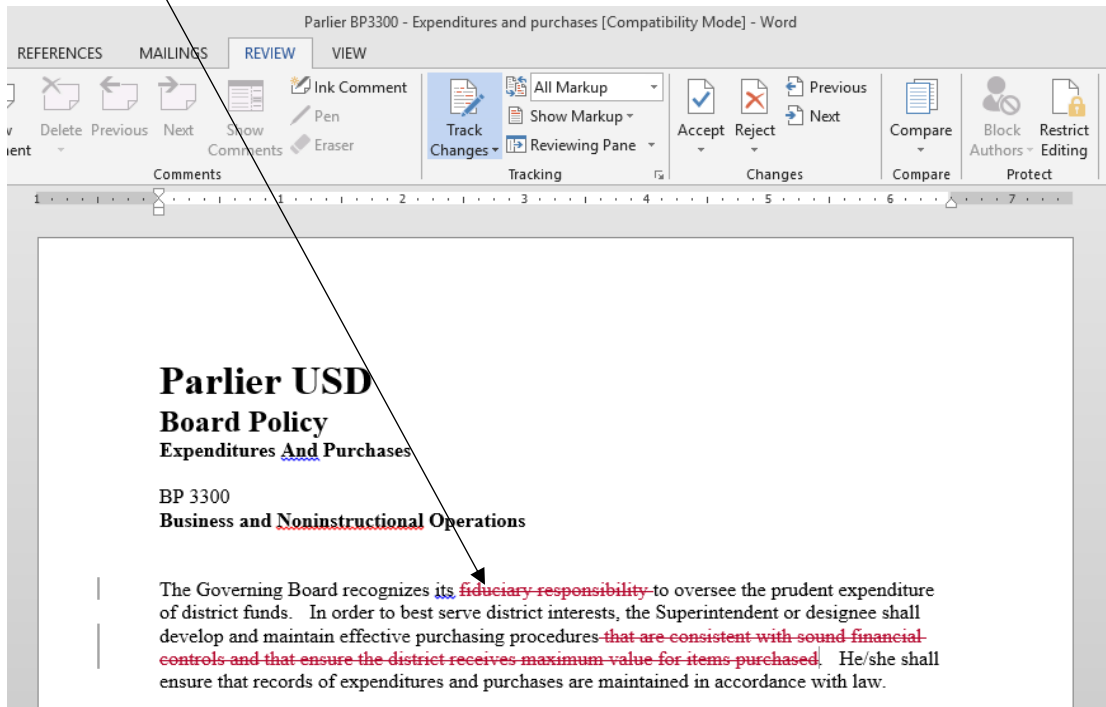
What you do:

- 1) Read the CSBA version, including the notes so that you can speak to changes at the board meeting if called upon. Consider the "Optional" sections of board policy for how Parlier operates. These sections can be omitted if we do not feel they are needed or if they conflict with how we operate. **Notes and **Optional section descriptions should never be included in board policy.
- 2) Open up Parlier version of existing policy in WORD. Immediately activate the Review function in Word

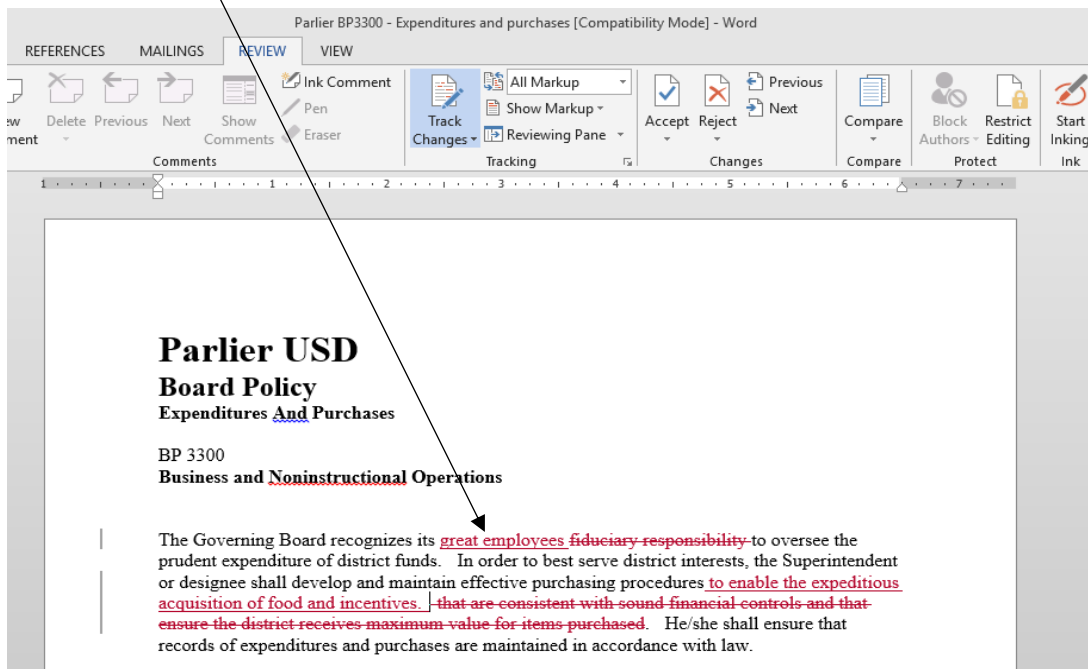


- 3) Click Track Changes and select Track Changes
- 4) Click All Markup
- 5) Open up CSBA version in WORD next to the Parlier version

- 6) In the Parlier version delete sections that are no longer valid. Deleted sections will turn red and have a line through them. Delete can be done by highlighting sections or by backspacing through the section. Your document will look like this:

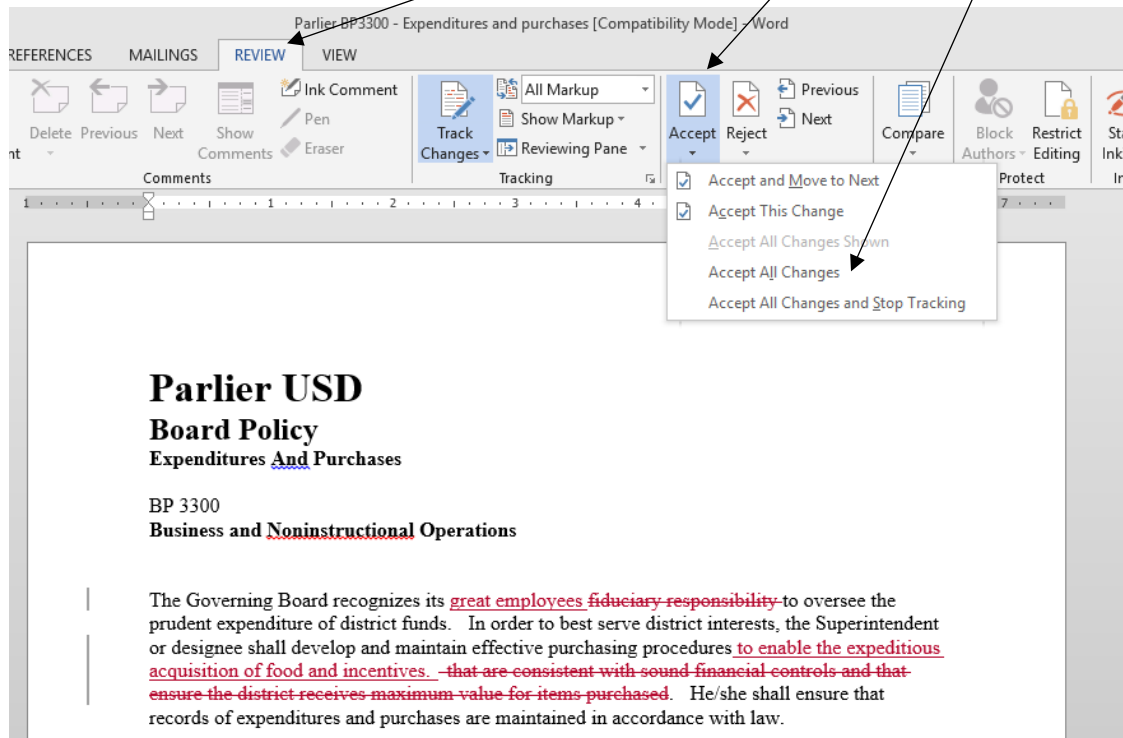


- 7) From the CSBA version, copy and paste new sections into the Parlier version. New sections will be red and underlined. Your document will look like this:

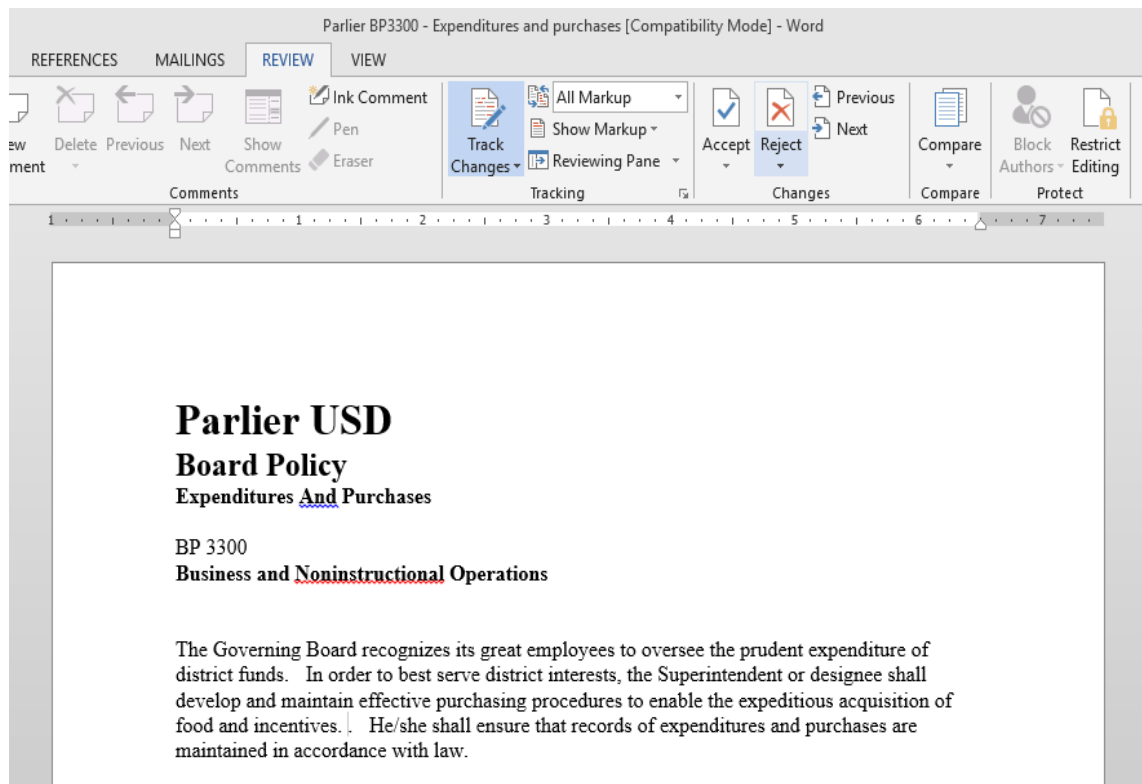


- 8) When the all revisions have been made save the Parlier version as BP 3300 1st reading, print in color for the board.
- 9) After board meeting of 1st reading, incorporate any changes into the 1st reading version.

10) Open up the 1st Reading version, select Review and click Accept and Accept All Changes



11) After clicking Accept All Changes the system will remove all deletions and change all additions to standard black font. See below



12) Save document as BP 3300 2nd Reading and send WORD version to Gloria.