

MONTANA CHILD CARE BUSINESS CONNECT

ZEROTOFIVE MONTANA

FAMILY HANDBOOK DEVELOPMENT GUIDE

Family Handbook Development Guide, Outline & Review Checklist

Introduction

Purpose of This Resource

A family handbook is one of the most important communication tools used by an early childhood education program. It helps families understand the program's philosophy, operational practices, expectations, and policies while promoting consistency, transparency, and positive relationships.

This Family Handbook Outline is designed to help child care owners, directors, and administrative leaders develop, review, or revise their own handbook. It identifies major topics and policy areas commonly found in comprehensive family handbooks, with special consideration given to the operational, regulatory, and risk management needs of early childhood programs.

This resource intentionally **does not** provide sample policy language.

Every child care business operates under unique circumstances including licensing requirements, organizational structure, staffing patterns, philosophy, enrollment practices, contractual agreements, insurance coverage, and local laws. Policies should be customized to reflect the specific practices and decisions of each program.

The outline should be used as a planning tool, organizational guide, and quality assurance checklist rather than a template for direct adoption of specific language.

How to Use This Outline

This resource may be used in several ways:

Developing a New Family Handbook

Use the outline to identify sections and topics that should be considered when creating a handbook from the ground up.

Reviewing an Existing Family Handbook

Compare your current handbook against the outline to determine whether important topics are missing, outdated, unclear, or inconsistent with current practices.

Preparing for Licensing or Accreditation

Review handbook content alongside applicable licensing regulations, accreditation standards, and organizational policies to help ensure alignment.

Evaluating Business Operations

Many handbook policies reflect operational practices. Missing or outdated policies may signal areas where procedures, systems, or decision-making processes need clarification.

Annual Policy Review

Programs should conduct regular reviews of handbook policies to ensure they continue to accurately reflect current operations, legal requirements, and family expectations.

Suggested Review Method

As you work through the outline:

- ☐ Mark topics already addressed in your handbook.
- ☐ Highlight sections that require updates.
- ☐ Identify missing policies or procedures.
- ☐ Verify alignment with licensing regulations and enrollment agreements.
- ☐ Confirm that actual business practices match written policies.
- ☐ Review for consistency, clarity, and ease of understanding.

Important Note

This resource is intended as an educational and business planning tool. It is not legal advice and should not be interpreted as a substitute for professional legal, human resources, insurance, licensing, tax, or regulatory guidance.

Programs are responsible for ensuring that their policies comply with all applicable federal, state, tribal, and local requirements.

Additional Support

This outline is intended to support self-assessment, handbook development, and continuous improvement efforts.

Programs seeking organization-specific technical assistance related to leadership, human resources, business operations, fiscal management, policies and procedures, or organizational systems may contact Montana Child Care Business Connect's Senior Child Care Business Advisor, Jason Nitschke, at JasonN@ZerotoFive.org.

For support related to classroom practices, quality improvement, coaching, curriculum, learning environments, or other program quality initiatives, programs are encouraged to contact your local SPARK Montana Technical Assistance Provider or the SPARK Montana Help Desk.

Title Page

Logo

Company name

Owner name/title

Address

City/State/Zip

Phone

Email

Website

Social Media

Current date: --/--/----

Review dates:

Update dates:

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Disclaimers Statement #1

- ***Use bold, large, capitalized, or special type, and be placed under a conspicuous and descriptive heading.***
    - Disclaimer statements should be placed in prominent positions in the handbook and should use clear and unambiguous language.
    - Disclaimers that have generally proven to be an effective defense against an implied contract charge typically include the following:
        - Statements clearly expressing the policy of the program and language that explicitly state that the handbook is not a contract.
            - The enrollment contract is the contract.
        - The policies and procedures described in the handbook may be changed or deviated from at the discretion of the provider at any time with or without notice.

SECTION 1: BUSINESS INFORMATION

Our Purpose

- Mission
- Vision
- Value Proposition
- Goals and Objectives

Licensing, Insurance, and Safety

- Date of Original License Approval
- Licensing Renewal Information
- In the Event of Issuance of Licensing Probation
    - See Also, Administrative Rules of Montana (ARM) 37.96.1111
- General Liability Insurance
- Additional Insurance Information
- First Aid/CPR
- Safety plan
    - See Also, Administrative Rules of Montana (ARM) 37.96.4
- Mandatory reporting
- Record Retention – three years
    - See Also, Administrative Rules of Montana (ARM) 37.96.306, 307, 308
- Waivers & alternative compliance plan language. As required by ARM 37.96.303(9)
- Annual policy review/update statement. As required by ARM 37.96.303(10)
- Other

Days and Hours of Operation

- Calendar
- Days Open
- Days Closed
- Details on Paid/Unpaid Days
- Standard Hours of Operation
- Extended Hours – Early Drop-off/Late Pickup

Enrollment Procedure

See Also, Administrative Rules of Montana (ARM) 37.96.308, 312

- Enrollment requirements
    - Enrollment forms
    - Enrollment/Registration fees
    - Emergency contact form
    - Emergency consent forms
    - Parental consent forms
    - Release of authorization for pickup
    - Health Information forms

    - Medical forms
    - Medication administration forms
    - Cot/Mat Authorization form for children 12-18 months
    - Transportation authorization form
    - Immunization status
        - See also ARM 37.96.806(2) and ARM 37.96.810
    - Religious and Medical Exemption Forms
        - See also ARM 37.96.8
    - Special needs/allergies
    - Changes to parental contact information/updating forms
    - Signed parental agreement form
- Termination of Enrollment
        - See Also, Administrative Rules of Montana (ARM) 37.96.312
    - Expectations for finding the right fit
    - Why enrollment might be terminated
    - Procedures for terminating enrollment

Tuition and Fees

See Also, Administrative Rules of Montana (ARM) 37.96.312

- Statement on Pay to Attend or Pay to Enroll
- Fee increases notifications
- Billing period
- Full-time tuition
- Part-time tuition
- Registration fees
- Transportation fees
- Field trip fees
- Food fees
- Materials fees
- Scholarships and Tuition Assistance
- Pro-rated Policy
- Withdrawal Policy
- Discount Policy

Child Care Management System

- Uses and functionality
- Communication
- Signatures
- Payment transactions

Payment Methods Accepted

- Bank transfers
- Cash

- Checks
- Credit Cards
- Digital payment methods

SECTION 2: CLIENT RESPONSIBILITIES AND PROVIDER EXPECTATIONS

Absences

- Notification of absence procedures
- Daily attendance logs
- Ratios' relevance to absence and business practices

Arrival and Dismissal Procedures/Pick-up and Drop-off Procedures

- Parking
- Drop-off time
- Pick-up times
- Safety
- First Days and Goodbyes
- Transitions

Open Door Policy

See Also, Administrative Rules of Montana (ARM) 37.96.312

- Meeting with the director
- Meeting with teachers
- Internal complaint reporting procedures
- External complaint reporting procedures

Changes to Policies and Notification of Parents

- Policy changes
- Signatures of acknowledgement
- Statement of additional policies and procedures not posted in Family Handbook

SECTION 3: CHILD CARE PROGRAM DETAILS

Daily Schedule

See also, Administrative Rules of Montana (ARM) 37.96.202, programs "…must have a written plan of daily activities and routines."

See Also, Administrative Rules of Montana (ARM) 37.96.312

- Breakfast
- Morning Lessons
- Snacks
- Recess
- Lunch
- Afternoon Lessons
- Free Play
- Rest Time
- Snack
- Circle Time

Nap/Rest Time

- Duration
- Mats and Cribs
- Safety
- Supervision

Safe Sleep Practices

See Also, Administrative Rules of Montana (ARM), 37.96.303

See Also, Administrative Rules of Montana (ARM) 37.96.415

- Safe Sleep Plan
- Sleep positions
- Sleep environment
- Supervision of infant sleep
- Training
    - Staff acknowledgment/signature confirming they read and understand the policy. (ARM 37.96.303(3))

Teaching Philosophy

- Montana Early Learning Standards
- Teacher's credentials
- Age Group Breakdown and Classrooms
- Teacher interaction
- Small Group
- Large Group
- Individual

- Free play
- Social/emotional
- Self-direction
- Teacher-guided

Program Curriculum

- Age appropriate
- Handwriting
- Multisensory
- Cross-curricular connections
- Assessments and Tailored Instructional Plans

Toys, Dress and Extra Clothing

- Responsibility
- Personal Belongings
    - Infants
    - Toddlers
    - Preschoolers
    - School-age

Diapering and Toileting

- Staff supervision and assistance
    - Staff Will:
    - Staff Won't:
- Potty Training
    - Is your child ready to be potty trained list?

Illnesses

See Also, Administrative Rules of Montana (ARM) 37.96.312

See Also, Administrative Rules of Montana (ARM) 37.96.505

- When to stay home
    - See Also, ARM 37.96.505(2)
- How long to stay home
- When a child will be sent home
- Head Lice

Medication

See Also, Administrative Rules of Montana (ARM), 37.96.303

See Also, Administrative Rules of Montana (ARM) 37.96.5

- Types of medication permitted. As required by ARM 37.96.303(1)(f)(i)
- Per-child documentation of route, amount, and times. As required by ARM 37.96.303(1)(f)(ii)
- Parent/guardian authorization requirement. As required by ARM 37.96.303(1)(f)(iii))

- Medication Administration Procedures
- Medication Administration Authorization Requirements
    - See Also, ARM 37.96.502
- Statement about the administration of medicines at home
- Five Essential Safety Rights

Immunizations

- Current records and documentation
    - See Also, Administrative Rules of Montana (ARM) 37.96.802
- Immunization Exemptions
    - See Also, Administrative Rules of Montana (ARM) 37.96.805
    - Medical Exemption
        - See Also, Medical Exemption Statement Form HES 101A
    - Religious Exemption
        - See Also, Religious Exemption Form HES-113
    - Homeless/Foster Care
        - See Also, Administrative Rules of Montana (ARM) 37.96.802(1)
- Parental responsibility
- State law – Vaccination requirements for child care attendance
- Company policy on vaccination for attendance

Snacks and Nutrition

- Who provides snacks
- Restrictions on full-time/part-time
- Special instances of snacks
- Food safety
- Standard weekly menus
- Bottle feeding
- Breast feeding
- Food restrictions and allergies

Injuries and Emergencies

See Also, Administrative Rules of Montana (ARM), 37.96.303

- Staff First Aid/CPR statement
    - First-aid/CPR policy alignment with Caring for Our Children standards. As required by ARM 37.96.303(1)
- Emergency Disaster Plan
    - See Also, ARM 37.96.410
- Emergency medical release form requirements
- Definitions
    - Minor injuries
    - Major injuries

- Incident/injury reporting to parents, retention on file, and CCL notification within 24 hours for emergencies. As required by ARM 37.96.303(1)(d)(ii)
- Directions for calling parents/guardians when a child is sick or injured. As required by ARM 37.96.303(1)(e))
- Hospitalization and Ambulances

Transportation

See Also, Administrative Rules of Montana (ARM) 37.96.312

See Also, Administrative Rules of Montana (ARM) 37.96.414

- Safe transport practices (driver qualifications, head counts, loading/unloading, restraints, vehicle checks). As required by ARM 37.96.303(6)
- Field trips
- Evacuation plans
    - Off-site gathering point, individual needs, staff responsibilities, parent communications & reunification, shelter-in-place/lockdown, and continuity of operations. As required by ARM 37.96.303(2)(a)-(f)

Water Safety

See Also, Administrative Rules of Montana (ARM) 37.96.413

- Water safety policy for pools or natural bodies of water – as required by ARM 37.96.303(7)
    - Supervision
    - Ratios
    - Barriers
    - Permissions
    - Emergency procedures

Behavior Management

See Also, Administrative Rules of Montana 37.93.3

See Also, Administrative Rules of Montana (ARM) 37.96.312

- Positive reinforcement
- Spanking policy/prohibited behaviors of staff
- Behavior expectations
- Discipline procedures
    - Expulsion, See also Administrative Rules of Montana (ARM) 37.96.303
    - Written suspension policy (alongside expulsion). As required by ARM 37.96.303(5)
- Shaken Baby Syndrome/Abusive Head Trauma policy (recognition training, coping procedures, mandatory reporting). As required by ARM 37.96.303(4)
- Reporting behavior concerns
- Screenings/assessments

Disclaimers Statement #2

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Signature and Acknowledgement of Receipt

Parent/Family Member Name

Parent/Family Member Signature

Date

Director Name

Director Signature

Date

For internal use only:

Distribute digital and/or physical copies:

- ☐ To Parent(s)/Family Member(s)
- ☐ To Director/Administrator

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