

# Toronto District School Board

Governance Procedure PR501

Title: **POLICY DEVELOPMENT AND MANAGEMENT**

Adopted: October 8, 2002  
Effected: October, 8, 2002  
Revised: November 10, 2015; **October 26, 2016**  
Reviewed: January 16, 2017  
Authorization: Board of Trustees

## 1.0 RATIONALE

This *Policy Development and Management* operational procedure (the “Procedure”) supports implementation of the Board’s *Policy Framework (P001)*.

## 2.0 OBJECTIVE

To provide a process and instructions for developing and reviewing TDSB policies.

## 3.0 DEFINITIONS

*Board* is the Toronto District School Board, which is also referred to as “TDSB”.

*Canadian Standard English* is a variety of English in which most educational texts, government, and media communications are produced in Canada.

*Consultation* is a two-way communication process between the Board and external participants, including students and their parents/guardians, school councils, advisory committees, community members, different levels of government, service agencies, professional organizations and union partners. The objective of consultation is to gather public input regarding options, alternative courses of action and/or directions to help inform decision-making.

*Policy* is a statement of intent, governing principles or end result adopted by the Board in public and intended to guide future actions.

*TDSB* is the Toronto District School Board, which is also referred to as the “Board.”

## **4.0 RESPONSIBILITY**

While the Board of Trustees is responsible for establishing Board policies, the Director of Education holds the primary responsibility for overseeing the process by which new and revised policies are developed and ultimately presented to the Board.

Within the Director's Office, the responsibility for the day-to-day management and coordination of policies is assigned to the Executive Officer, Governance and Board Services, and, subsequently, to the Policy Coordinator.

## **5.0 APPLICATION AND SCOPE**

This Procedure applies to all employees involved in development, review, and revision of the Board's policies.

## **6.0 PROCEDURES**

### **General Requirements**

- 6.1. Policies will be adopted, revised or revoked by the Board of Trustees' resolution only. Housekeeping changes to the policies may be authorized by Executive Council (e.g., updating obsolete references to legislation, job titles, department names, etc.).
- 6.2. The need to develop a new or revised policy may arise as a result of a: (1) resolution of the Board of Trustees; (2) legislative requirement; (3) government policy or directive; or (4) recommendation of Executive Council.
- 6.3. Information about policy needs arising from new legislative or government policy requirements, and information about substantive revisions to operational procedures, will be communicated to the Board of Trustees through the Governance and Policy Committee on a timely basis.
- 6.4. A member of Executive Council will be assigned by the Director of Education to lead the development of a new or revised policy under supervision of the Governance and Policy Committee.
- 6.5. Trustees, including student trustees, will be notified by the Executive Council member when a policy development or review is commenced by staff, and will be provided with an opportunity for timely input into the policy development/review.
- 6.6. The assigned Executive Council member will obtain policy directions and input regarding the new or revised policy from the Governance and Policy Committee prior to initiating formal development or review of the policy.

6.7. Within each department, the appropriate member of Executive Council will assign staff to work with the Board's Policy Coordinator to:

- (a) co-ordinate the development and review of policies pertaining to the department, including preparation of policy development/review work plans, presentation to Executive Council and the Governance and Policy Committee;
- (b) ensure that new and revised policies are compliant with the Policy Framework (P001), other applicable Board policies, and this Procedure;
- (c) identify budgetary implications of any new or revised policy;
- (d) ensure that a new policy and substantive revisions to an existing policy are reviewed and signed off by a cross-departmental working group (using the *Policy Review Sign-off Sheet* – see Appendix B), prior to submission of the drafts to the Director of Education.

The cross-departmental staff working group will include on a permanent basis:

- Legal Services
  - Governance and Board Services
  - Government, Public and Community Relations, and
  - Departments directly affected by the subject policy
- (e) ensure that the draft policy is reviewed and approved by the Director of Education prior to conducting public consultations or presenting the policy to a Committee of the Board or to the Board of Trustees;
  - (f) ensure that any substantive changes to Board policy are reflected in all the appropriate department documents (e.g., operational procedures, guidelines, bulletins, pamphlets).

6.8. Policy will include timeframe for regular review and evaluation. Key performance indicators, outcomes, and measures that will be used for evaluation of a policy will be identified as part of the policy development process.

### **Policy Development**

6.9. Development of a new policy must be authorized by the Board of Trustees upon recommendation of an appropriate Committee of the Board.

6.10. Once the recommendation to develop a new policy is approved, the Governance and Policy Committee (or other Committee, as instructed by the Board of

Trustees) will oversee development of the policy, working with the assigned Executive Council member.

- 6.11. New policies will be developed in accordance with the *Policy Development Process Flowchart* outlined in Appendix C.
- 6.12. Policy development work plans will be prepared for every new policy (see Appendix D – *Policy Development Work Plan Template*).

### **Policy Review**

- 6.13. Board policies will be reviewed at a minimum every four years to ensure their effectiveness, relevance, and alignment with legislative requirements, government directives, decisions of the Board of Trustees and operational parameters.
- 6.14. Policies will be reviewed in accordance with the *Policy Review Process Flowchart* (see Appendix E).
- 6.15. Policy reviews will be implemented pursuant to the policy review schedule approved by the Board of Trustees. Revisions to the policy review schedule may be recommended by Executive Council and the Governance and Policy Committee.
- 6.16. Policy review work plans will be prepared for every policy under review (see Appendix F - *Policy Review Work Plan Template*).

### **Policy Consultations**

- 6.17. Policy development and review process will include consultations with external participants, e.g., students and their parents/guardians, school councils, advisory committees, community members, different levels of government, service agencies, professional organizations and union partners, as prescribed by the *Community Engagement Policy (P078)*.
- 6.18. Prior to initiating public consultations, a draft policy must be reviewed internally by the cross-departmental working group, as described above, and, subsequently, signed off by the Director of Education.
- 6.19. External consultations will be based on the following:
  - (a) A process for consultation will be developed at the beginning of the policy development/review;
  - (b) The purposes of consultation are:
    - o to provide a broader base for input

- to clarify and promote a better understanding of the issues
- to identify alternative courses of action
- to get expert advice where necessary
- to build trust and mutual respect
- to build positive relationships
- to build consensus
- to develop ownership and improve compliance
- to identify unintended effects for particular groups and to understand impact on equity seeking groups
- to balance contrasting perspectives

(c) Consultation methods may include:

- public meetings
- facilitated focus groups
- call for public delegations to the Governance and Policy Committee
- expert panel discussion
- survey
- posting a draft policy on the TDSB's website to solicit feedback

(d) A draft policy, executive summary, and impact statement, as appropriate, will be developed for distribution to consultation participants;

(e) Participants in a consultation process will be given clear mandates;

(f) Consultation will involve persons interested in the policy as well those who are affected by the proposed policy;

(g) Consultation will be characterized by openness, trust, integrity, and respect for the points of view of all participants;

(h) Participants will be informed of the results of the consultation.

6.20. The scope and duration of the consultation will be determined by the Governance and Policy Committee upon recommendation from staff and will be based on the following factors:

- application and scope of the policy
- significance of the policy impact on external stakeholders
- number of external stakeholders affected by the policy

6.21. At a minimum, consultations will always include: (1) extending invitations for consultation to all Advisory Committees of the Board and conducting consultations with the Advisory Committees that expressed interest (either individually with each interested committee or collectively with representatives of all interested committees), and (2) posting of the draft policy on the Board's

public website soliciting feedback within a minimum 30 calendar days. Information about policies under development or review will be available and highly visible on the Board's public website.

- 6.22. At a minimum, at least two consultation methods as listed in section 6.19. (c) will be applied for each policy development or review.
- 6.23. Consultation requirements will be applied consistently to policies with similar characteristics in terms of affected stakeholders and policy impact.
- 6.24. Consultations are not expected to be overly burdensome to implement and should not be expected to last more than three (3) months. If numerous external participant groups are identified for consultations, consultation methods that allow engaging multiple stakeholders simultaneously, such as public meetings, will be considered.
- 6.25. Consultations are not required for the Ministry of Education mandated policies, (i.e., policies that are developed or revised following formal directions from the Minister of Education or his/her designate), unless the TDSB policy significantly exceeds or deviates from the requirements set out by the Ministry of Education. Notification about the Ministry of Education mandated policies will be provided to all Advisory Committees of the Board and to the public through the Board's website.
- 6.26. Consultations are not required for policies, which are identified by the respective Executive Team members responsible for the policies and confirmed by the Governance and Policy Committee, as internal corporate policies that have no direct external participants.
- 6.27. A consultation will be deemed completed for the purpose of this Procedure when all required arrangements, including extending invitations for consultation and providing advance notices, were properly implemented, even if only limited feedback to the draft policy was received.

### **Policy Format and Style**

- 6.28. Policy will be written in a plain and clear language that is easily understood by the general public.
- 6.29. Policy will be written in Canadian Standard English, based on the following resources (as amended from time to time) for spelling, grammar, style, and punctuation:
  - *Editing Canadian English*, 2<sup>nd</sup> Edition, Revised and Updated, Editor's Association of Canada

- *Keep It Simple: How To Write So Your Readers Will Understand*, Communications and Public Affairs, Toronto District School Board (2000)
  - *More Than a Style Guide*, TDSB Resource Document
  - *The Canadian Oxford Dictionary*, by Katherine Barber
  - *The Chicago Manual of Style, 16th Edition* University of Chicago Press, John Grossman, August 2010
- 6.30. Abbreviations and acronyms will be explained in the Definitions section and not spelled out again in the body of the policy.
- 6.31. New and revised policies will be drafted in accordance with the *Policy Template* (see Appendix A).
- 6.32. After approval of a policy by the Board of Trustees, Governance and Board Services staff will assign the appropriate policy number, add the adoption date and any other required information as per the Policy Template.

### **Policy Communication and Notifications**

- 6.33. Governance and Board Services will record new and revised policies in the minutes of the Board and publish policies for staff and the public on the Board's websites in accordance with the *Policy Framework (P001)*.
- 6.34. Board staff will be notified of the availability of new and revised policies through the existing communications methods.

## **7.0 EVALUATION**

This procedure will be reviewed as required, but at a minimum every four (4) years after the effective date.

## **8.0 APPENDICES**

- Appendix A: Policy Template (Form 501A)
- Appendix B: Policy Sign-off Sheet (Form 501B)
- Appendix C: Policy Development Process Flowchart
- Appendix D: Policy Development Work Plan Template (Form 501C)
- Appendix E: Policy Review Process Flowchart
- Appendix F: Policy Review Work Plan Template (Form 501D)

## **9.0 REFERENCE DOCUMENTS**

Policies:

- Community Engagement Policy (P078)
- Policy Framework (P001)

Procedures:

- Operational Procedures (PR502)

Other Documents:

- *Editing Canadian English*, 2nd Edition, Revised and Updated, Editor's Association of Canada
- *Keep It Simple: How To Write So Your Readers Will Understand*, Communications and Public Affairs, Toronto District School Board (2000)
- *More Than a Style Guide*, TDSB Resource Document
- *The Canadian Oxford Dictionary*, by Katherine Barber
- *The Chicago Manual of Style*, 16th Edition University of Chicago Press, John Grossman, August 2010



# Toronto District School Board

Policy P [number]

Title: [POLICY TITLE]

Adopted: [date of approval of the policy]

Effected: [date when the policy came into effect]

Revised: [date when the policy was amended]

Reviewed: [date when the policy was reviewed]

Authorization: [position/level that has authority to approve the policy or changes hereto]

## 1.0 RATIONALE

Provide a brief description of the policy's need and focus. Identify reason(s) why this policy was developed (e.g., direction of the Board of Trustees, government directive/policy, legislative requirement, decision of Executive Council, etc.). Provide sufficient details.

## 2.0 OBJECTIVE

Outline what the policy is intended to accomplish.

## 3.0 DEFINITIONS

Provide explanation of key words, phrases, abbreviations, and acronyms used in the policy, for example:

*RFP* is a Request for Proposal.

*Sponsorship* is an agreement between the Board or school and an association or company by which the sponsor provides financial or resource support in exchange for advertisement.

## 4.0 RESPONSIBILITY

Identify position of staff (member of Executive Council) responsible for content and implementation of the policy.

## 5.0 APPLICATION AND SCOPE

Identify persons / departments to whom the policy applies.

Identify types of transactions, activities, or functions to which policy applies.

## 6.0 POLICY

Policy is limited to broad aspects of the Board's operations. This section should contain focused statements of the Board's intent, governing principles, or desired results related to the subject and expressed in simple, straightforward language. They should be broad enough to allow flexibility in dealing with diverse situations at minimal expense, while ensuring consistency across the system.

### Numbering system:

#### 6.1 Text, text, text

##### 6.1.1 Text, text, text

##### (a) Text, text, text

##### (i) Text, text, text

##### (A) Text, text, text

##### (I) Text, text, text

## 7.0 SPECIFIC DIRECTIVES

This section may be used to establish outside parameters for executive action, to set minimum or maximum ranges, and to attach specific conditions and exceptions to the policy.

At least one Specific Directive should relate to the responsibility of the Director, i.e., "The Director is authorized to issue operational procedures to implement this policy."

## 8.0 EVALUATION

Frequency of assessment of the effectiveness and relevance of the policy (minimum every four years after effective date).

## 9.0 APPENDICES

List supplementary documents, if included with the policy:

Appendix A: [title, same as on actual appendix], [brief explanation, if required]

Appendix B: [title, same as on actual appendix], [brief explanation, if required]

## 10.0 REFERENCE DOCUMENTS

List in alphabetical order all documents referenced in the body of the policy, including legislative acts and regulations, other Board policies and operational procedures.

- Board Operational Procedure Title (PRxxx)
- Board Policy Title (Pxxx)
- *Education Act*, sections 23 (3) (5)

**TORONTO DISTRICT SCHOOL BOARD**  
Governance and Board Services

**POLICY SIGN-OFF SHEET**

*The completed Policy Sign-off Sheet should be provided along with the draft policy to the Director of Education for approval **prior to** conducting public consultations or presenting the draft policy to a Committee of the Board or the Board of Trustees.*

<b>Title/Subject:</b>  [Policy Title]	<b>DATE:</b>  [Date]
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**Policy Type:**     New     Revised

**Reviewed By and Recommended for Approval by the Director of Education:**

Position / Department	Name	Signature	Date IN	Date OUT
[Lead Department – Policy Owner]				
[Head(s) of Department(s) directly impacted by the Policy]				
[Legal Services]				
[Governance and Board Services]				
[Government, Public and Community Relations]				

<b>Director of Education</b>				
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**SIGNATORIES CONFIRM THE FOLLOWING:**

- Accuracy of information and content data related to the signatory’s respective area of expertise

**ATTACHMENTS:**    Draft [Policy Title]

**POLICY DEVELOPMENT PROCESS**

**APPENDIX C**

**Phase 1:**  
Approval of Policy Rationale

**Phase 2:**  
Obtaining Trustees' Directions and  
Drafting Policy

**Phase 3:**  
Internal Reviews and Sign-offs

**Phase 4:**  
External Consultations

**Phase 5:**  
Committee/Board Approvals

**Phase 6:**  
Implementation

**START**  
Policy Development  
*Initiated by staff*

Contact Policy Coordinator

Submit rationale for the new Policy to Executive Council for approval

Submit rationale for the new Policy to the Board through appropriate Committee for approval

**START**  
Policy Development  
*initiated by Trustees through Board approval*

Present Policy Development Work Plan to the Governance and Policy Committee and seek input and directions

Create draft Policy

Identify internal stakeholders and conduct reviews and consultations

Obtain sign-offs from:

- Departments directly affected by the Policy;
- Legal Services;
- Governance and Board Services;
- Government, Public & Community Relations

Submit draft Policy to Executive Council for input

Obtain sign-off from Director of Education

Are external consultations applicable to this Policy?

Identify external participants for consultations

Determine appropriate public consultations method

Conduct external consultations

Is Policy further revised as a result of consultations?

If applicable, submit draft Policy to appropriate Board Committee(s) for input

Submit draft Policy to Governance and Policy Committee

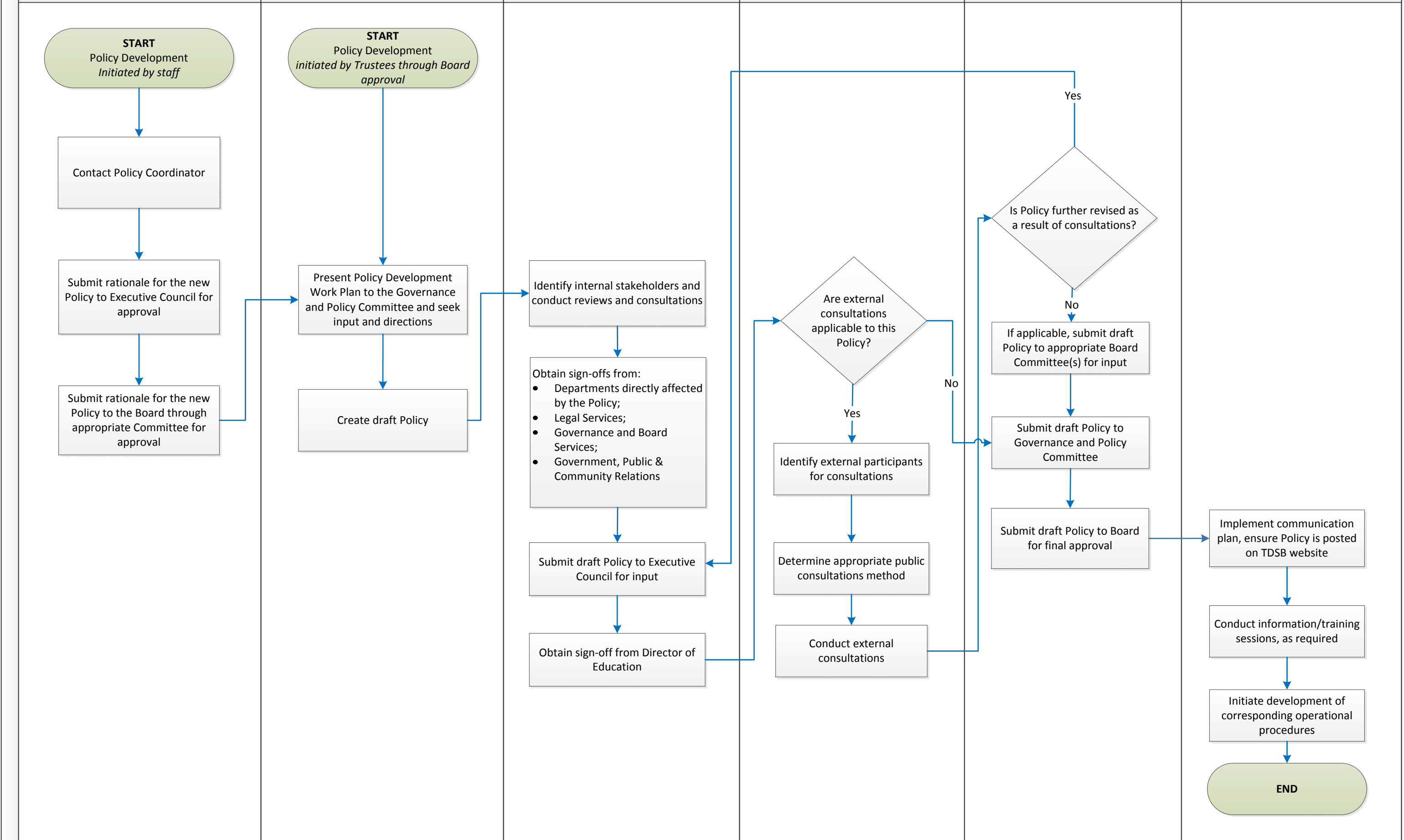
Submit draft Policy to Board for final approval

Implement communication plan, ensure Policy is posted on TDSB website

Conduct information/training sessions, as required

Initiate development of corresponding operational procedures

**END**



**POLICY DEVELOPMENT WORK PLAN**  
TEMPLATE

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Date: [today's date]

All policies will be developed to ensure consistency with the TDSB's *Mission and Value (P002)* policy, including the principles within the TDSB's Integrated Equity Framework that promote equity and inclusion.

**POLICY INFORMATION**

Proposed Policy Title:

Executive Council member responsible for development of the new Policy:  
[provide position of the Executive]

**Phase I. APPROVAL OF POLICY RATIONALE**

The rationale for the new Policy: [provide brief summary]

The development of the new Policy was authorized by the Board of Trustees on [provide date]

This Policy Development Work Plan has been discussed with the Policy Coordinator:

- Yes
- No

**Phase II. OBTAINING TRUSTEES' DIRECTIONS AND DRAFTING POLICY**

This Policy Development Work Plan will be discussed at the Governance and Policy Committee meeting held on: [provide date]

**Creating the Draft Policy**

The draft Policy will be created and aligned with the current Policy Template (see Operational Procedure PR501, Policy Development and Management, Appendix A):

- Yes
- No

- A review of leading practices for similar policies across jurisdictions has been completed and is included with this Work Plan.

### Phase III. INTERNAL REVIEWS AND SIGN-OFFS

The draft Policy will include input from TDSB departments affected by the Policy:  
[select applicable]

- Equity and Achievement  
 Facilities, Sustainability and Employee Services  
 Finance and Operations

In addition, the following three departments will be required to sign-off on the proposed draft Policy:

- Governance and Board Services  
 Government, Public and Community Relations  
 Legal Services

Following internal reviews and TDSB departments' sign-offs, the draft Policy will be submitted to Executive Council on: [provide date]

A sign-off from the Director of Education will be obtained before proceeding with external consultations and/or Committee/Board approval.

- Director of Education

### Phase IV. EXTERNAL CONSULTATIONS

Are external consultations applicable to this Policy?

- Yes  
 No (*Ministry of Education mandated policy or corporate policy without external stakeholders*)

Mandatory external consultations will include, at minimum:

1. Posting of the working draft Policy on the TDSB website for public feedback (30 days minimum)

2. Extending invitations for consultation to all Advisory Committees of the Board and conducting consultations with the Advisory Committees that expressed interest (either individually with each interested committee or collectively with representatives of all interested committees): [\[provide projected dates of consultations\]](#)

- Aboriginal Community Advisory Committee
- Alternative Schools Advisory Committee
- Black Student Achievement Community Advisory Committee
- Community Use of Schools Advisory Committee
- Early Years Advisory Committee
- Environmental Sustainability Community Advisory Committee
- Equity Policy Advisory Committee
- French as a Second Language Advisory Committee
- Inner City Advisory Committee
- Parent Involvement Advisory Committee (PIAC)
- Special Education Advisory Committee (SEAC)
- Student Nutrition Advisory Committee

In addition to mandatory consultations, other external participants and projected dates of consultation(s) include: [\[provide details\]](#)

- Student SuperCouncil
- School Councils
- Other: [\[provide details\]](#)

The following methods will be applied in the external consultations: [\[at least two or more methods must be selected\]](#)

- Public meeting
- Facilitated focus group
- Call for public delegations
- Expert panel discussion
- Survey
- Posting on the TDSB website
- Other: [\[provide details\]](#)

**Phase V. COMMITTEE/BOARD APPROVALS**

Following external consultations and revisions, the working draft Policy will be presented to the Governance and Policy Committee on the following date: [provide date]

Following recommendation by the Governance and Policy Committee, the new Policy will be presented to the Board on the following date: [provide date]

Once approved, the new Policy will be added to the TDSB website.

**Phase VI. IMPLEMENTATION**

Following Board approval, the new Policy will be communicated through:

- Posting of the new Policy on the TDSB website through the Policy Coordinator
- Sharing with staff through the System Leaders' Bulletin
- Informing departments at staff meetings and channeling information to the school principals through respective superintendents
- Implementation of a broad communication plan for internal and external audiences

Policy implementation will include:

- Conducting information/training sessions to TDSB staff affected by the Policy

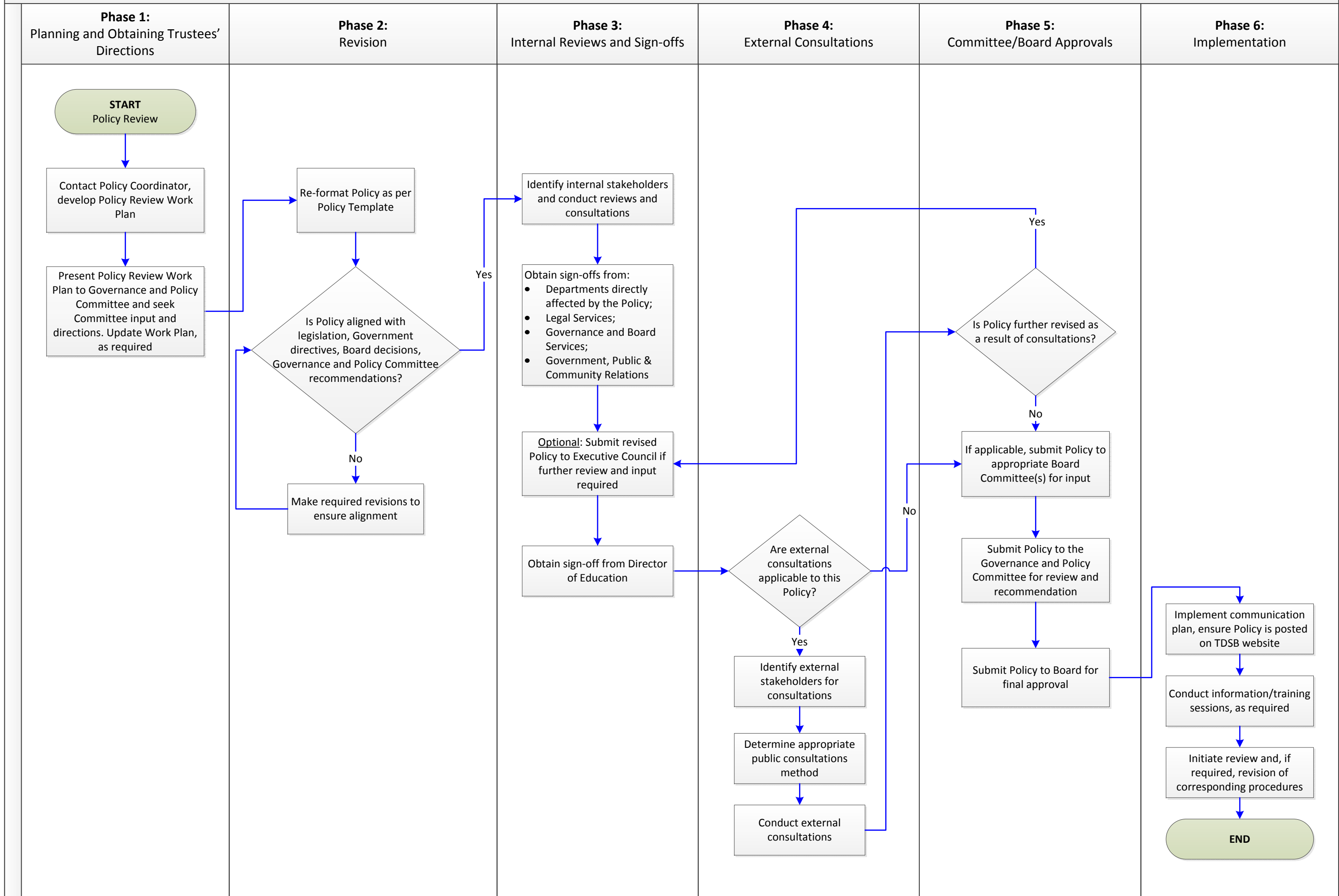
The projected time period for conducting information/training sessions to staff will be: [provide date(s)]

- Initiate development of new procedures or review of associated procedures [identify procedures to be developed and, if applicable, existing procedures to be reviewed]



**POLICY REVIEW PROCESS**

**APPENDIX E**



**POLICY REVIEW WORK PLAN  
TEMPLATE**

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Date: [today's date]

All policies will be reviewed to ensure consistency with the TDSB's *Mission and Value (P002)* policy, including the principles within the TDSB's Integrated Equity Framework that promote equity and inclusion.

**POLICY INFORMATION**

Policy Title and Policy Number:

Review during fiscal year:

Last reviewed: [date]

Executive Council member responsible for this Policy review: [provide position of the Executive]

**Phase I. PLANNING AND OBTAINING TRUSTEES' DIRECTIONS**

This Policy Review Plan has been discussed with the Policy Coordinator:

- Yes
- No

This Policy Review Plan will be discussed at the Governance and Policy Committee meeting held on: [provide date]

**Phase II. REVISIONS**

**Formatting Changes**

The Policy will be reformatted to ensure alignment with the current Policy Template (Operational Procedure PR501, Policy Development and Management):

- Yes
- No

**Content Changes**

The Policy requires content revisions:

- Yes
- No

The content changes are due to the following reason(s): [\[select one or more\]](#)

- Legislation
- Government directives/policies
- Board decisions
- Operational requirements
- Simplify and/or update using plain language
- Alignment with Integrated Equity Framework

Detailed information on the proposed content changes: [\[provide details\]](#)

- [\[insert text here\]](#)
- [\[insert text here\]](#)
- [\[insert text here\]](#)
- [\[insert text here\]](#)
- [\[insert text here\]](#)

A review of leading practices for similar policies across jurisdictions has been completed and is included with this Work Plan.

### **Phase III. INTERNAL REVIEWS AND SIGN-OFFS**

The Policy review will include TDSB divisions affected by the Policy: [\[select applicable\]](#)

- Equity and Achievement
- Facilities, Sustainability and Employee Services
- Finance and Operations

In addition, the following departments will be required to sign-off on the proposed Draft Policy:

- Legal Services
- Governance and Board Services
- Government, Public and Community Relations

A sign-off from the Director of Education will be obtained before proceeding with external consultations and/or Committee/Board approval.

- Director of Education

**Phase IV. EXTERNAL CONSULTATIONS**

Are external consultations applicable to this Policy?

Yes

No (*Ministry of Education mandated policy or corporate policy without external stakeholders*)

Mandatory external consultations will include, at a minimum:

1. Posting of the working draft Policy on TDSB website for public feedback (30 days minimum)
2. Extending invitations for consultation to all Advisory Committees of the Board and conducting consultations with the Advisory Committees that expressed interest (either individually with each interested committee or collectively with representatives of all interested committees): [\[provide projected dates of consultations\]](#)

- Aboriginal Community Advisory Committee
- Alternative Schools Advisory Committee
- Black Student Achievement Community Advisory Committee
- Community Use of Schools Advisory Committee
- Early Years Advisory Committee
- Environmental Sustainability Community Advisory Committee
- Equity Policy Advisory Committee
- French as a Second Language Advisory Committee
- Inner City Advisory Committee
- Parent Involvement Advisory Committee (PIAC)
- Special Education Advisory Committee (SEAC)
- Student Nutrition Advisory Committee

In addition to mandatory consultations, other external participants and projected dates of consultation(s) include: [\[provide details\]](#)

- Student SuperCouncil
- School Councils
- Other: [\[provide details\]](#)

The following methods will be applied in the external consultations: [at least two or more methods must be selected]

- Public meeting
- Facilitated focus group
- Call for public delegations
- Expert panel discussion
- Survey
- Posting on the TDSB website
- Other: [provide details]

**Phase V. COMMITTEE/BOARD APPROVALS**

Following external consultations and revisions, the working draft Policy will be presented to the Governance and Policy Committee on the following date: [provide date]

Following recommendation by the Governance and Policy Committee, the revised Policy will be presented to the Board on the following date: [provide date]

Once approved, the revised Policy will replace the existing policy on the TDSB website.

**Phase VI. IMPLEMENTATION**

Following Board approval, the final revised Policy will be communicated through:

- Posting of the revised Policy on the TDSB website through the Policy Coordinator
- Sharing with staff through the System Leaders' Bulletin
- Informing departments at staff meetings and channeling information to the school principals through respective superintendents
- Implementation of a broad communication plan for internal and external audiences

Policy implementation will include:

- Conducting information/training sessions to TDSB staff affected by the Policy

The projected time period for conducting information/training sessions to staff will be: [provide date(s)]

- Review of associated procedures or initiate development of new procedures [identify procedures to be reviewed and, if applicable, procedures to be developed]