Toronto District School Board

PR589, Vetting External Presentations Interim Procedure: Revised Procedure

To: Governance and Policy Committee

Date: 9 February, 2022

Report No.: 02-22-4250

Strategic Directions

- Transform Student Learning
- Create a Culture for Student and Staff Well-Being
- Provide Equity of Access to Learning Opportunities for All Students
- Allocate Human and Financial Resources Strategically to Support Student Needs
- Build Strong Relationships and Partnerships Within School Communities to Support Student Learning and Well-Being

Recommendation

It is recommended that the revised Vetting External Presentations Interim Procedure (PR589), as presented in this report, be received for information.

Context

The Vetting External Presentations Procedure (PR589) was adopted on July 2, 2008 supporting implementation of the Educational Programming Partnerships Policy (P024), and was last reviewed on June 17, 2014.

In the fall of 2021, staff developed the Vetting External Presentations Interim Procedure (the "Interim Procedure"), which replaced the Vetting External Presentations Procedure. The revised Interim Procedure clarified the review and approval process for engaging guest speakers at the TDSB as outlined in section 6.1.5. The scope of the Interim Procedure was expanded to include both educational and professional guest speaker engagements. The Interim Procedure applies to all schools, departments, and any organizational unit at the TDSB.

This Interim Procedure will be in effect until a permanent process is developed and finalized.

The revised Interim Procedure was approved by Executive Council on November 30, 2021 and is presented to the Committee for information.

Action Plan and Associated Timeline

Subject to the Governance and Policy Committee's receipt, the Interim Procedure will be provided to the Board of Trustees on March 9, 2022 for information.

Resource Implications

The Interim Procedure will be implemented within existing budget framework.

Communications Considerations

The revised Vetting External Presentations Interim Procedure (PR589) is posted on the Board's internal and external website and has been communicated through the System Leaders' Bulletin.

Board Policy and Procedure Reference(s)

- Educational Programming Partnerships Policy (P024)

Appendices

- Appendix A: Vetting External Presentations Interim Procedure (PR589) – Revised Clean
- Appendix B: Vetting External Presentations – Interim Procedure Application and Scope Flowchart

From

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Toronto District School Board

Operational Procedure PR589 (Interim)

Title: **VETTING EXTERNAL PRESENTATIONS**

Adopted: July 2, 2008
Effected: July 2, 2008
Revised: June 17, 2014; **November 30, 2021**
Reviewed: June 17, 2014; **November 30, 2021**
Authorization: Executive Council

1.   RATIONALE

As educators, we care deeply about our students and as such, we support and invest in their potential. Every student deserves to be encouraged and given the best resources to help them reach their potential. As staff, we are committed to professional growth and service excellence.

Guest speakers are one key lever among many that our school board uses to inspire students and staff about possible future choices and what it might take to reach them. Speakers are also invited to broaden our perspectives -- to see the world outside of their classroom, department, and local community. Speakers should serve as great role models and should energize and inspire students and staff. They can add educational or professional value by sharing their deep knowledge and new perspectives. Speakers support students' and staff identities, attitudes and motivation, careers understanding, and self-confidence.

We are committed to supporting access to a wide range of experiences, resources, and our understanding of all viewpoints. We believe speakers inspire through the direct sharing of information, insights, encouragement, and advice.

2.   OBJECTIVE

This Vetting External Presentations Interim Procedure (the "Interim Procedure") will be in place until a permanent process is developed.

This Interim Procedure applies to external speaking engagements that have not already been vetted and approved by one of the organizational units listed in section 5.0 that are subject to other TDSB policies and procedures, and/or have well-established standardized operational processes.

This Interim Procedure is another component to ensure we are being responsive and responsible in the selection and review of speakers. Our selection criteria will assess speakers against criteria including for example, the appropriateness for the intended audience, curriculum or operational expectations, as well as equity, anti-racism and human rights perspectives.

3. DEFINITIONS

N/A

4. RESPONSIBILITY

Director of Education

5. APPLICATION AND SCOPE

This Interim Procedure applies to all schools, departments, and any organizational unit at the TDSB, except the following which are subject to other TDSB policies and procedures, and/or have well-established standardized operational processes:

- Parent and Community Engagement Office
- Urban Indigenous Education Centre
- Centre of Excellence for Black Student Achievement
- Educational Partnership Office
- Business Development and Community Services
- Board of Trustees/Trustee Services
- TDSB Heritage Month Committees
- Community Advisory Committees
- School Councils

For business/operations units, this Interim Procedure applies to external speakers engaged to provide information or instruction on topics that are not purely technical and operational in nature.

6. PROCEDURE

6.1. Vetting & Approval Process

Please follow this process to obtain approval for a proposed external speaker event:

6.1.1. Staff/department seeking to retain an external speaker ("Proposer") will conduct research and identify a proposed speaker and topic.

6.1.2. Proposer fills out External Speaker Proposal Package ("ESPP") (at Appendix "A"). Please ensure the package is complete to avoid delays and to maximize opportunities for approval.

6.1.3. The Proposer sends the completed ESPP to the relevant Vetting Committee members (see section 6.2) who will assess the proposal using the Vetting Assessment Scoresheet & Approval Form ("VASAF").

6.1.4. After the Vetting Committee completes its review, the ESPP and VASAF will be returned to the Proposer who will forward both documents to the relevant "Approver" listed below for review and approval.

6.1.5. If Approver approves the ESPP and VASAF, the Approver will sign the VASAF form and forward both documents to the Proposer and to the individual to whom the Approver reports, as set out below:

Approval and Notification Process Chart		
Type of Event (Proposer)	**Approver**	**Notified of Approval of Event**
Classroom speaker (staff/student)	Principal	Superintendent
School-wide speaker (staff/student)	Principal	Superintendent
Learning Network (Principal)	Superintendent	Executive Superintendent
Learning Centre (Superintendent)	Executive Superintendent	Associate Director
Central Business and Academic Operations (staff)	Senior Manager	Executive Officer/SOE
	Executive Officer/SOE	Associate Director

6.1.6. If the ESPP is not approved, the Proposer may speak with the Approver or Vetting Committee members to determine why the proposal was not approved and identify potential ways to modify the proposal for reconsideration.

6.2. Vetting Committees

Vetting committees will vary in composition depending on the audience as indicated in the table below. Each committee must have at least three (3) members. Membership and term of membership (e.g., each school year, every two years, permanent) will be determined by those identified in the "Designated by" column.

Speaking Engagement Audience	Membership (minimum three (3) members)	Designated by
Class	School staff	Principal
School-wide	School staff plus a Principal from another school within the same Learning Network	Principal
Leadership, Learning & School Improvement	May consist of Executive Superintendent, Superintendent, and/or Equity Superintendent or Centrally Assigned Principal of Equity	Associate Director
Equity, Well-Being & School Improvement		
Human Rights & Indigenous Education	May consist of Executive Officer/SOE, Unit Manager, and/or System Superintendent	Executive Superintendent
Business Operations and Services Excellence, Government, Public and Community Relations, Governance and Board Services	May consist of Executive Officer, Unit Manager, and/or System Superintendent	Associate Director

6.3. Speaking Event Evaluation

We strongly encourage Proposers to seek feedback from participants about the speaker and the speaker's presentation. This information will be valuable in assessing whether the speaker achieved the objectives of the presentation and TDSB's expectations, and whether the speaker may be accepted onto a pre-approved list in the future (work in progress).

A sample feedback form is set out in Appendix "B". Feedback should be collected, collated and reported to the Approver on an aggregate basis.

7. EVALUATION

The Interim Procedure will be reviewed at least annually or until a permanent procedure is implemented, whichever comes first.

8. APPENDICES

- Appendix A: External Speaker Proposal Package
- Appendix B: Speaker Evaluation Form (sample)

9. REFERENCE DOCUMENTS

N/A

External Speaker Proposal Package

To: [Names of Vetting Committee Members]

From: [Name, Position, Organizational Unit of Proposer]

Date: [Date Submitted]

Proposal (please fill out each section below in detail):

1. Purpose, Overview & Deliverables

2. Anticipated learning outcomes (for classes and schools, please identify connection to curriculum; for system/central - alignment with MYSP, learning and growth)

3. Date(s)

4. Duration of Event (in hours)

5. Audience (anticipated composition and size)

6. Fees (if more than $10,000 and speaker is not a pre-approved vendor, please attach an approved Sole/Single Source Form)

Please check:
- ☐ Budget holder has confirmed the school/unit's budget will cover the proposed fees **(required)**
- ☐ Blank Vetting Assessment Scoresheet & Approval Form is attached **(required)**
- ☐ Signed Sole/Single Source form is attached (**if applicable**)
- ☐ Attach proposed contract/agreement **(if available)** and ensure the contract/agreement is sent to Legal Services for review and approval before retaining the external speaker

Vetting Assessment Scoresheet & Approval Form

(To be completed by Vetting Committee)

Criteria	1 - Needs Improvement, no evidence provided 2 - Satisfactory, little evidence provided 3 - Good, sufficient evidence provided 4 - Excellent - extensive evidence provided	Score - 1 to 4 points
1. Alignment with goals and priorities of TDSB MYSP and connection to course curriculum (for schools)	Supports equity priority or at least one of these MYSP priorities: • Transforms student learning • Creates a culture for Student & Staff Well-Being • Builds Strong Relationships and Partnerships Within School Communities to Support Student Learning & Well-Being	
2. Consistent with our related Human Rights and Equity policies and procedures	• Avoids all forms of intimidation, harassment, or discrimination • Does not use materials or symbols which promote prejudice or incite hatred • Not associated with external advocacy groups • Aligns with PR532 - Handling Concerns About Learning Resources and Controversial Issues • Willing to listen to and engage in open conversations with audience on opposing views/perspectives	
3. Human, facility, and financial value	• Conforms to the educational goals of TDSB and the school • Represents responsible allocation of human and financial resources to support optimal student learning, based on the principles of equity and excellence	
4. Anticipated outcomes	• Speaker's past engagements outside of TDSB have been reviewed and no concerns have been identified • Speaker has spoken at previous TDSB events with overall positive feedback from audience and no concerns identified • Speaker's published materials (if any) have been reviewed and confirmed to align with	

	TDSB's vision, MYSP, equity and human rights policies • Presentation is age and/or grade appropriate (appropriate for audience) • Speaker & presentation fosters a supportive, respectful and caring environment	
5. Educational value	Presentation will: • connect to and will enhance curriculum expectations • promote or improve student learning opportunities • support staff capacity building and performance • support the understanding that diverse groups have of each other	
Total Score	**Add scores.** **If the total score is at least 16/20, Proposal is eligible for approval. Send to Approver for review and signature.**	**/20**

Approved by Approver:

Signature:	Date:
Print Name and Title:	

Important Instructions

Approver: please send copies of the signed form to the Proposer and to the person to whom the Approver reports (see section 6.1.5 **Approval and Notification Process Chart)**.

Proposer: please provide signed ESPP and VASAF and the speaker's proposed contract/agreement/terms of engagement for review and approval by Legal Services (**required**) before retaining the Speaker.

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Speaker Evaluation Form (sample)

Thank you for helping us to improve the value of our presentations. Please fill out the survey below and return it as directed.

Speaker's Name:_____

School/Unit/Group Receiving Presentation:_____

Date of Speaking Engagement:_____

Name of Person Completing Evaluation:_____

What learning/educational value did you receive from this session? (check one)

| Very Low | Low | Average | High | Very High |

	5 (Outstanding)	4 (Great)	3 (Good)	2 (Poor)	1 (Very Poor)
Speaker Delivery: • *Was the speaker engaging enough?* • *Did the speaker start and end on time?*					
Content: *Was the presentation:* • *supportive of the curriculum expectations?* • *anti-racist?* • *affirming of diverse identities?* • *relevant to supporting culturally relevant practices?* • *suitable for the audience?* • *relevant to the topic?* • *easy to follow?*					

Q&A: • **Was the presentation interactive and engaging?** • **Was there enough time?** • **Were the answers informative?**					

Visual Aids:
• **Were there enough visual aids?**
• **Were the visual aids:**
  o **well used (readable)?**
  o **relevant to supporting or enhancing the presentation?**					

What is the best idea you heard in this session that you plan to use?

What will you do (or do differently) because of this presentation?

What did you like best about the presentation?

What will you tell others about this presentation?

What else would you like to share?

Note: Submit an analysis of the feedback received to the Approver.

Vetting External Presentations - Interim Procedure
Application and Scope

Research & Identify
- Proposer searches for potential speaker and topic

Propose
- Complete External Speaker Proposal Package (ESPP)
- Send ESPP to Relevant Vetting Committee (VC) members

Vet
- VC assesses proposal using Vetting Assessment Scoresheet & Approval Form (VASAF)
- VC returns ESPP and completed VASAF to Proposer
- Must score at least 16/20 to be eligible for approval

Approve
- Proposer forwards to Approver
- Approver reviews and signs VASAF if acceptable
- Approver forwards ESPP and signed VASAF to Proposer

Notify
- Approver forwards ESPP and signed VASAF one level up