

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; **February 6, 2019**

Reviewed: January 16, 2017, **February 6, 2019**

Authorization: Board of Trustees

1.0 RATIONALE

This *Policy Development and Management* governance 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 co-ordination of this procedure 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 the 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 the Director's 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 the Director's 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 the Director's Council will be assigned by the Director of Education to lead the development of a new or revised policy, working in consultation with the Governance and Policy Committee.
- 6.5. Trustees, including student trustees, will be notified by the Director's Council member when a policy development or review is commenced by staff, and will be provided with an opportunity for timely input into the development/review of the policy.
- 6.6. The assigned Director's 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 the Director's 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 Director's Council and the Governance and Policy Committee;
- (b) ensure that new and revised policies are compliant with the Policy Framework (P001), Equity Policy (P037), other applicable Board policies and this Procedure;
- (c) identify equity impact and 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 a timeframe for regular review and evaluation.

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 Director's 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 policy under development (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 the Director's 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*).
- 6.17. Policies that are mandated by legislation to be reviewed on an annual basis may undergo a simplified review process annually and a complete process every four years (e.g., Occupational Health and Safety Policy, Workplace Violence Prevention Policy, etc.). Under the simplified process, the policy may be exempted from consultation requirement if no substantive changes to the policy are being proposed.

Policy Consultations

- 6.18. 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)*.
- 6.19. 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.

6.20. 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:
 - to provide a broader base for input
 - to clarify and promote a better understanding of the issues
 - to identify alternative courses of action
 - to identify service gaps and or patterns of systemic bias or barriers
 - 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 engage those voices traditionally marginalized or silenced
 - to identify unintended effects for members of disenfranchised groups and communities and to understand impact on equity of opportunity, access and outcomes
 - 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 using a comment tool to solicit feedback
- (d) A draft policy, executive summary, and equity 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 diversity, fairness, access, openness, trust, integrity, and respect for the points of view of all participants;

- (h) Participants will be informed of the results of the consultation;
 - (i) Consultation will ensure maximum accessibility for participants.
- 6.21. 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
- 6.22. At a minimum, consultations will always include: (1) extending invitations for consultation to the Student Senate and all Community Advisory Committees of the Board and conducting consultations with the Community 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 and using a survey and comment/portal tool to solicit feedback within a minimum 45 calendar days. Information about policies under development or review will be available and highly visible on the Board's public website.
- 6.23. At a minimum, at least two consultation methods as listed in section 6.20. (c) will be applied for each policy development or review.
- 6.24. Consultation requirements will be applied consistently to policies with similar characteristics in terms of affected stakeholders and policy impact.
- 6.25. Consultations are not expected to be overly onerous to implement and, in most cases, 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, may be considered.
- 6.26. Consultations are not required for policies mandated by the Ministry of Education (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.
- 6.27. Consultations are not required for policies, which are identified by the respective Director's Council member(s) responsible for the policies and confirmed by the Governance and Policy Committee, as internal corporate policies that have no direct external participants.

6.28. 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

6.29. Policy will be written in a plain and clear language that is easily understood by the general public and ensures:

- gender neutral language (i.e., they and them instead of he/ she, parents/guardians instead of mother/ father, etc.)
- consistent use of P037 Equity Policy glossary terms
- compliance with the *Accessibility for Ontarians with Disabilities Act* AODA

6.30. 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*, 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

6.31. Abbreviations and acronyms will be explained in the Definitions section and not spelled out again in the body of the policy.

6.32. New and revised policies will be drafted in accordance with the *Policy Template* (Appendix A).

6.33. 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

6.34. 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 website in accordance with the *Policy Framework (P001)*. A summary of policy revisions and expected outcomes will be included with the policy communication.

6.35. 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:

- *Accessibility for Ontarians with Disabilities Act*
- *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]
Effectuated: [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. 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 Director's Council, etc.). Provide sufficient details.]

2. OBJECTIVE

[Outline what the policy is intended to accomplish.]

3. DEFINITIONS

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

TDSB is the Toronto District School Board, which is also referred to as the "Board".

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. RESPONSIBILITY

[Identify position of staff (member of Director's Council) responsible for content and implementation of the policy.]

5. APPLICATION AND SCOPE

[Identify persons / departments to whom the policy applies.]

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

6. 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

6.1.1. Text

(a) Text

(i) *Text*

(A) *Text*

(l) Text

7. 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 of Education, i.e., "The Director of Education is authorized to issue operational procedures to implement this policy."]

8. EVALUATION

[Identify frequency of assessment of the effectiveness and relevance of the policy (must be at a minimum every four years after effective date).]

9. 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. 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:]

Legislation

- *Education Act*, sections 23 (3) (5)
- Ontario Regulation 213 [title]

Policies

- Board Policy Title (Pxx)

Procedures

- Board Operational Procedure Title (PRxx)

Other Documents:

- Ministry of Education, Policy and Program Memoranda [title]

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.*

Title/Subject: [Policy Title]	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 Executive Owner]				
[Head(s) of Department(s) directly impacted by the Policy]				
[Legal Services]				
[Governance and Board Services]				
[Government, Public and Community Relations]				

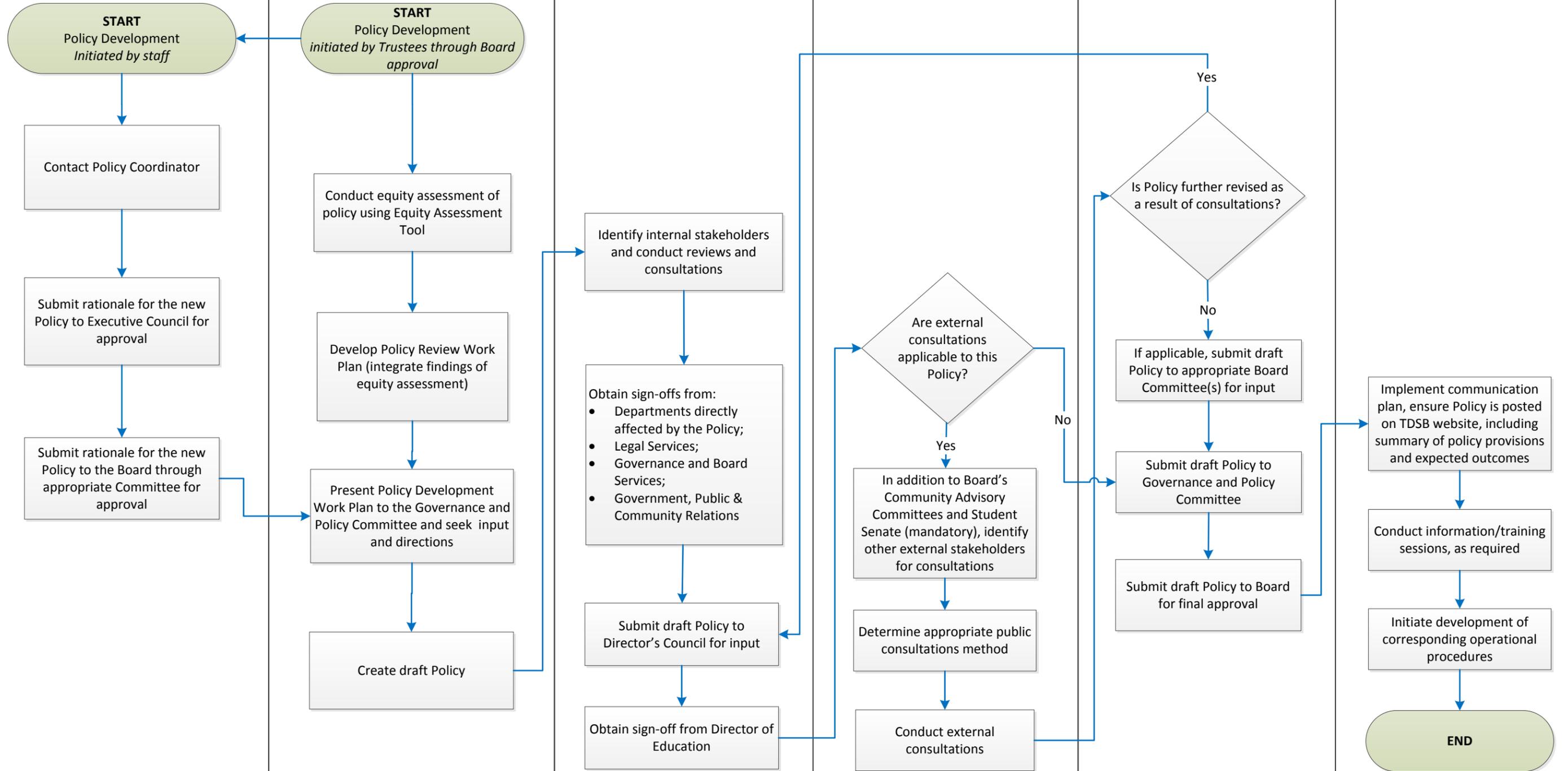
Director of Education				
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SIGNATORIES CONFIRM THE FOLLOWING:

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

ATTACHMENTS: Draft [Policy Title]

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
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POLICY DEVELOPMENT WORK PLAN
TEMPLATE

Date: [\[today's date\]](#)

All policies will be developed to ensure consistency with the TDSB's Mission, Values and Goals Policy (P002), the Equity Policy (P037) and the Board's Multi-Year Strategic Plan.

POLICY INFORMATION

Proposed Policy Title:

Director's 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

Detailed information on the proposed policy provisions, including findings of the policy equity assessment: [\[provide details\]](#)

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

- Business Operations and Service Excellence
- Equity, Well-Being and School Improvement
- Human Rights and Indigenous Education
- Leadership, Learning and School Improvement
- School Operations and Service Excellence

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

Following internal reviews and TDSB departments' sign-offs, the draft Policy will be submitted to Director's 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 (45 days minimum)
2. Extending invitations for consultation to:

Student Senate

and

all Community Advisory Committees of the Board and conducting consultations with the Community 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 Community Advisory Committee
- Black Student Achievement Community Advisory Committee
- Community Use of Schools Community Advisory Committee
- Early Years Community Advisory Committee
- Environmental Sustainability Community Advisory Committee
- Equity Policy Community Advisory Committee
- French-as-a-Second-Language Community Advisory Committee
- Inner City Community Advisory Committee
- Parent Involvement Advisory Committee (PIAC)
- Special Education Advisory Committee (SEAC)

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

- School Councils
- Professional Associations and Unions
- 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:

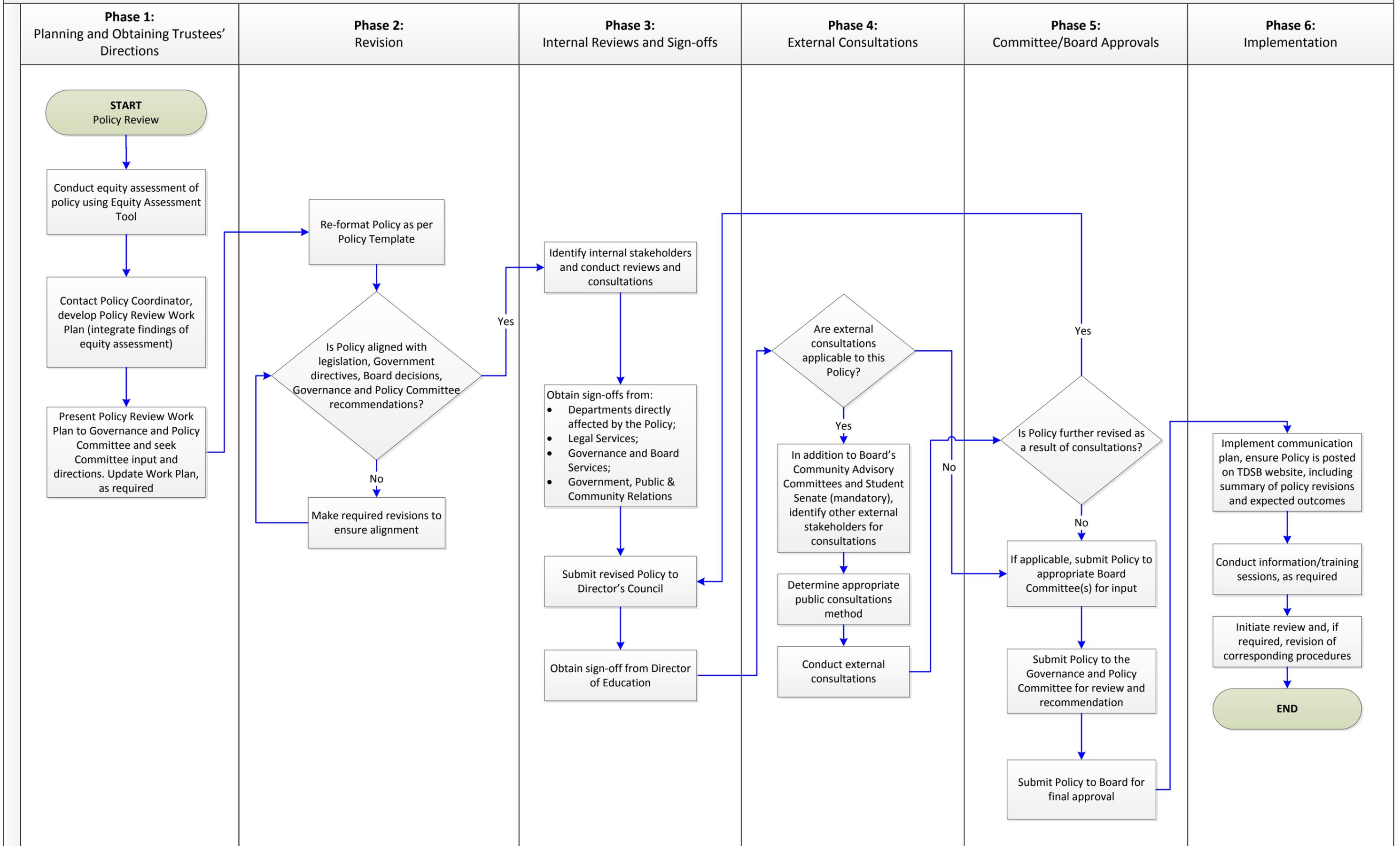
- Posting of the new Policy on the TDSB website through the Policy Coordinator
- Sharing with staff through the System Leaders' Bulletin
- Informing departments at staff meetings and channeling information to the school principals through respective superintendents
- Implementation of a broad communication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

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 WORK PLAN
TEMPLATE**

Date: [today's date]

All policies will be reviewed to ensure consistency with the TDSB's Mission, Values and Goals Policy (P002), the Equity Policy (P037) and the Board's Multi-Year Strategic Plan.

POLICY INFORMATION

Policy Title and Policy Number:

Review during fiscal year:

Last reviewed: [date]

Director's 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, Appendix A):

- 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
- Multi-Year Strategic Plan requirements
- Operational requirements
- Simplify and/or update using plain language
- Alignment with Equity Policy

Detailed information on the proposed content changes, including findings of the policy equity assessment: [\[provide details\]](#)

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

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: [\[select applicable\]](#)

- Business Operations and Service Excellence
- Equity, Well-Being and School Improvement
- Human Rights and Indigenous Education
- Learning and School Improvement
- School Operations and Service Excellence

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 (45 days minimum)

2. Extending invitations for consultation to:

Student Senate

and

all Community Advisory Committees of the Board and conducting consultations with the Community 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 Community Advisory Committee

Black Student Achievement Community Advisory Committee

Community Use of Schools Community Advisory Committee

Early Years Community Advisory Committee

Environmental Sustainability Community Advisory Committee

Equity Policy Community Advisory Committee

French-as-a-Second-Language Community Advisory Committee

Inner City Community Advisory Committee

Parent Involvement Advisory Committee (PIAC)

Special Education Advisory Committee (SEAC)

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

- School Councils
- Professional Associations and Unions
- 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, include summary of policy revisions and expected outcomes

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
[\[identify procedures to be reviewed and, if applicable, procedures to be developed\]](#)