



# AGENDA

## Board Meeting

Wednesday, April 26, 2023

7 p.m. – Open Session

Please note that all public sessions of Board Meetings are live-streamed and recordings are posted on the Peel District School Board website.

Members of the public can attend the public session of Board Meetings by watching the live-stream.

For additional details, including the live-stream link, visit [www.peelschools.org/trustees](http://www.peelschools.org/trustees).

# AGENDA

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## Open Session

Wednesday, April 26, 2023

1. **Call to Order – 6:30 p.m.**
2. **Motion to Convene in Closed Session - No Closed Session**
3. **National Anthem and Acknowledgement of Traditional Lands – 7 p.m.**
4. **Approval of Agenda**
5. **Declaration of Conflict of Interest**
6. **Celebrating Board Activities**
  - 6.1. Peel IT Support Staff and Media Support Services Appreciation Day – May 12, 2021
  - 6.2. Asian Heritage Month - May
  - 6.3. Jewish Heritage Month – May
  - 6.4. School/Student/Staff Successes
7. **Staff Recognition**
  - 7.1. Retirements
8. **Board Chair’s Announcements**
9. **Director’s Report**
10. **Report from Student Trustees**
11. **Reports from Trustees Appointed to External Organizations**
  - 11.1 Report from Trustee Benjamin regarding Volunteer MBC
12. **Consent Agenda**
13. **Approval of Minutes from Previous Board and Special Board Meetings**
  - 13.1. Board Meeting – March 29, 2023
14. **Committee Minutes for Receipt and Motions for Consideration**

# AGENDA

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- 14.1 Minutes – Special Education Advisory Committee – February 21, 2023
- 14.2 Minutes – Audit Committee – March 9, 2023
- 14.3 Minutes – Physical Planning, Finance and Building Committee – April 4, 2023
- 14.4 (a) Minutes – Governance and Policy Committee – April 12, 2023  
(b) Motions for Consideration – Governance and Policy Committee – April 12, 2023

## 15. Staff Reports/Reports

- 15.1. Ministry Directives
  - a) Directive 24 – Employment System Review – Final Report – *presentation by Jaspal Gill*
- 15.2. Suspension, Expulsion, Safe Schools Incident Reports and Employee Workplace Incident Violence Reports Data – *presentation by Harjit Aujla*
- 15.3. Appointment of Peel District School Board Student Trustees 2023-2024 **(Oral)** - *presentation by Chair David Green*
- 15.4. Recommended Candidate for Special Education Advisory Committee (SEAC) Vacant Member Seat – *presentation by Paul da Silva*
- 15.5. Annual United Way Campaign Board Report **(Oral)** (For information) – *presentation by United Way Chair Michael Miller and Superintendent of Education Leslie Grant*

## 16. Communications

## 17. Trustee Motions for Consideration

## 18. Trustee Notices of Motion

- 18.1. Notice of Appointment of Trustees to the OPSBA Board of Directors: June 2023 – June 2024

## 19. Adoption of the Closed Session Report

## 20. Adjournment

# *Celebrating Board Activities*



- 6.1 Peel IT Support Staff and Media Support Services Appreciation Day – May 12
- 6.2 Asian Heritage Month - May
- 6.3 Jewish Heritage Month – May
- 6.4 School/Student/Staff Successes

## 7.1

**Board Meeting, April 26, 2023**

# Retirements

**Strategic Alignment:**

Plan for Student Success – Safe, positive, healthy climate/well-being

**Report Type:**

For Information

*Prepared by:* Masuma Khangura, Executive Officer, Human Resources, Partnerships and Equity

Jaspal Gill, Associate Director, Operations and Equity of Access

*Submitted by:* Rashmi Swarup, Director of Education

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## Overview

**Objective:**

To recognize retiring Peel District School Board staff.

**Background:**

Each month, staff who are or have recently retired are recognized.

## Appendices

Appendix 1 – Retirements List

**RETIREMENTS**

ALBARRAN, Antonia  
Head Custodian  
Effective: May 31, 2023

ALLAN, Dave  
Classroom Teacher  
Effective: June 30, 2023

ANDERSON-REEVES, Lisa  
Classroom Teacher  
Effective: June 30, 2023

BARON, Nicole  
Classroom Teacher  
Effective: June 30, 2023

BLANEY, Paul  
Classroom Teacher  
Effective: June 30, 2023

BLANKSON-BAFFOE, Hannah  
Classroom Teacher  
Effective: April 30, 2023

BOIVIN, Brett  
Classroom Teacher  
Effective: June 30, 2023

BROWN, Helen  
Classroom Teacher  
Effective: June 30, 2023

BROWNE, Lisa  
Classroom Teacher  
Effective: June 30, 2023

**RETIREMENTS**

CALLEN, Michael  
Classroom Teacher  
Effective: April 30, 2023

CARDARELLI, Celestino  
Custodian  
Effective: April 30, 2023

CIFA, Giovannina  
School Attendant  
Effective: May 19, 2023

DE GASPERIS, Virginia  
School Attendant  
Effective: July 31, 2023

DHILLON, Hemindar  
Classroom Teacher  
Effective: June 30, 2023

FLETCHER, Gail  
Office Assistant  
Effective: June 30, 2023

GABRIELE, Diane  
Classroom Teacher  
Effective: June 30, 2023

GIDZINSKI, Yolanda  
Classroom Teacher  
Effective: April 30, 2023

GOUVEIA, Kelly  
Classroom Teacher  
Effective: June 30, 2023



**RETIREMENTS**

HOLMAN, Pauline  
Senior Partner, Workforce Planning  
Effective: April 14, 2023

HRYNKIW, Danuta  
Classroom Teacher  
Effective: June 30, 2023

HURLEY, Jacqueline  
Classroom Teacher  
Effective: June 30, 2023

INESON, Danielle  
Classroom Teacher  
Effective: June 30, 2023

JOHNSON, Cherie  
Classroom Teacher  
Effective: June 30, 2023

JONES, Mark  
Educational Assistant  
Effective: June 30, 2023

KONG, David  
Supervisor, FIS  
Effective: April 21, 2023

LAMME, Dorethy  
Classroom Teacher  
Effective: June 30, 2023

LATHAM, Jane  
School Attendant  
Effective: April 30, 2023

**RETIREMENTS**

LEAVITT, Gillian  
Classroom Teacher  
Effective: June 30, 2023

LEGREE, Melvin  
Classroom Teacher  
Effective: June 30, 2023

LOGUE, Michael  
Superintendent - Special Projects  
Effective: August 31, 2023

MACGREGOR, Lee  
Classroom Teacher  
Effective: June 30, 2023

MANDER, Inder  
Classroom Teacher  
Effective: June 30, 2023

MARSHALL, Karen  
Classroom Teacher  
Effective: June 30, 2023

MASKELL, Doug  
Classroom Teacher  
Effective: June 30, 2023

MAUTI, Pamela  
Classroom Teacher  
Effective: June 30, 2023

MCCLEARY, Debbie  
Classroom Teacher  
Effective: August 31, 2023

**RETIREMENTS**

MCDONALD, Heather  
Classroom Teacher  
Effective: June 30, 2023

MCGREGOR, Alan  
Classroom Teacher  
Effective: June 30, 2023

MCLEOD, Lisa  
Classroom Teacher  
Effective: April 30, 2023

MEHNDIRATTA, Aaloka  
Classroom Teacher  
Effective: May 31, 2023

MOTINO, Ada  
Custodian  
Effective: May 31, 2023

NICHOLLS, Belinda  
Classroom Teacher  
Effective: June 30, 2023

NIZIO, Joseph  
Classroom Teacher  
Effective: June 30, 2023

PHILIP, Kim  
Classroom Teacher  
Effective: June 30, 2023

REDHEAD, Joanne  
Principal  
Effective: June 30, 2023

**RETIREMENTS**

RINTOUL, David  
Classroom Teacher  
Effective: June 30, 2023

ROHDE, Nancy  
Classroom Teacher  
Effective: June 30, 2023

ROMANET, Dennis  
Vice-Principal  
Effective: June 30, 2023

SBRIZZI, Rosario  
Classroom Teacher  
Effective: June 30, 2023

SINGH, Fozia  
Office Manager  
Effective: June 30, 2023

SITUM, Heather  
Classroom Teacher  
Effective: June 30, 2023

SMITH, Lee Ann  
Office Assistant  
Effective: June 30, 2023

SMITH, Scott  
Classroom Teacher  
Effective: June 30, 2023

TAYLOR, Faye  
Educational Assistant  
Effective: August 31, 2023

**RETIREMENTS**

TEMPLAR, Bernice  
Classroom Teacher  
Effective: April 28, 2023

TOLAN, Deborah  
Principal  
Effective: June 30, 2023

VALLADARES, Edwin  
Custodian  
Effective: July 31, 2023

VAN ROOY, Petra  
Educational Assistant  
Effective: August 31, 2023

WATSON, Ty  
Classroom Teacher  
Effective: June 30, 2023

WRIGHT, Kristi  
Classroom Teacher  
Effective: April 30, 2023

YUASA, Daniel  
Receiver, General Worker  
Effective: April 30, 2023

## PEEL DISTRICT SCHOOL BOARD

Minutes of a Board Meeting of the Peel District School Board, held on Wednesday, March 29, 2023 at 19:10 hours. The hybrid meeting was held in the Board Room, the H. J. A. Brown Education Centre, 5650 Hurontario Street, Mississauga, Ontario, and by electronic means, under Ontario Regulation 463/97.

### Members present:

David Green, Board Chair	Jeffrey Clark (electronic)
LeeAnn Cole, Board Vice-Chair	Will Davies
Lucas Alves	Satpaul Singh Johal
Karla Bailey	Brad MacDonald
Susan Benjamin	Kathy McDonald (electronic)
Stan Cameron	Jill Promoli

### Student Trustees:

Evelyn Lee, Student Trustee South (electronic)

### Administration:

Rashmi Swarup, Director of Education  
Jeffrey Blackwell, Acting Associate Director, School Improvement and Equity, Leadership, Innovation and Safe Schools  
Paul da Silva, Associate Director, School Improvement and Equity, Special Education, Social Emotional Learning and Well Being  
Jaspal Gill, Associate Director, Operations and Equity of Access  
Camille Logan, Associate Director, School Improvement and Equity, Curriculum and Instruction, Student and Community Engagement  
Tania Alatishe-Charles, Controller, Finance Support Services  
Alvin Au, Acting Superintendent of Education  
Dahlia Battick, Acting Superintendent of Education  
Craig Caslick, Superintendent of Education  
Lara Chebaro, Superintendent of Education  
Yonnette Dey, Superintendent of Elementary Education – Curriculum, Instruction and Assessment  
Wendy Dobson, Acting Controller, Corporate Support Services  
Jasmine Dunn, Acting Executive Lead, Human Rights  
Donna Ford, Superintendent of Education  
Soni Gill, Superintendent of Education  
Tiffany Gooch, Executive Lead, Public Engagement and Communications  
Leslie Grant, Superintendent of Education  
Antoine Haroun, Chief Information Officer, Learning Technology Support Services  
Lisa Hart, Superintendent of Equity, Indigenous Education, Anti-Racism, Anti-Oppression and School Engagement  
Rasulan Hoppie, Superintendent, Curriculum, Instruction and Assessment

Administration: (Continued)

Lisa Leoni, Superintendent, Leadership, Capacity Building and School Partnerships  
Kathryn Lockyer, General Counsel and Governance Officer  
Michael Logue, Superintendent of Education  
Ozma Masood, Superintendent of Education  
Jennifer Newby, Superintendent, Special Education and Social Emotional Learning and Well-Being  
Neerja Punjabi, Superintendent of Education  
Claudine Scuccato, Superintendent of Education  
Bernadette Smith, Superintendent, Innovation and Research  
Michelle Stubbings, Superintendent, Safe and Caring Schools  
Thomas Tsung, Controller, Facilities and Environmental Support Services  
Sabrina Valleau, Governance Coordinator  
Kervin White, Superintendent of Education

Lorelei Fernandes, Board Reporter

**1. Call to Order**

Chair David Green called the meeting to order at 19:10 hours.

**2. National Anthem and Acknowledgement of Traditional Lands**

The National Anthem was sung and the land acknowledgement was read.

**3. Approval of Agenda**

Resolution No. 23-64 moved by Will Davies  
seconded by Jill Promoli

Resolved, that the agenda be approved.

..... carried

**4. Conflict of Interest**

There were no declarations of conflict of interest.

## **5. Celebrating Board Activities**

### **1. National Indigenous Day – March 31**

Board Chair, David Green acknowledged March 31<sup>st</sup> as National Indigenous Languages Day to honour the significance of language and culture to the identity of Indigenous peoples and celebrate the Indigenous languages of students, staff, and educators in continued support for education and revitalization of Indigenous languages in Peel District School Board and across Canada.

### **2. International Transgender Day of Visibility- March 31, 2023**

Chair Green recognized March 31<sup>st</sup> as International Day of Transgender Visibility, marking the importance of recognizing, supporting and celebrating transgender and gender-nonconforming people every day.

### **3. International Day of Pink – April 13, 2023**

Acknowledging April 12<sup>th</sup> as International Day of Pink, David Green stated that staff and students in PDSB schools and workplaces will wear pink in honour of International Day of Pink to put an end to all forms of bullying as a foundation for student achievement and well-being.

### **4. Administrative Professional's Day – April 26, 2023**

On the occasion of Administrative Professionals Day to be celebrated on April 26<sup>th</sup>, Chair Green thanked administrative professionals for their support to the school community and unwavering commitment to help students succeed.

### **5. Sikh Heritage Month – April**

In celebration of Sikh Heritage Month, Chair Green stated that work continues to centre around students' lived experiences as well as amplify Sikhs flourishing.

### **6. Autism Awareness and Acceptance Month – April 13, 2023**

In honour of Autism Awareness and Acceptance Month, Chair Green encouraged everyone to join in efforts to spread Autism acceptance, celebrating neurodiversity and creating a community where people with autism can reach their full potential.

### **7. Genocide Awareness, Education, Condemnation, and Prevention Month - April**

Chair Green stated that Genocide Awareness, Education, Condemnation and Prevention Month is an opportunity to reflect upon the atrocities of the past and to honour the legacies of victims and survivors by working in solidarity with one another to take a stand against hate, discrimination, prejudice, violence and injustices to ensure history does not repeat itself.

### **8. Earth Month – April**

April is Earth Month and is headlined by the international celebration of Earth Day, which PDSB schools will celebrate on April 20, 2023. This year's Earth Day theme is Invest in Our Planet.



**5. Celebrating Board Activities (Continued)**

**9. School/Student/Staff Successes**

Videos were played showing the exciting initiatives taking place in around PDSB, regarding Black History Month and a new, innovative badging program, as well as work being done by students and teachers.

Resolution No. 23-65 moved by Jill Promoli  
seconded by Brad MacDonald

Resolved, that the oral report re Celebrating Board Activities, be received.

..... carried

**6. Staff Recognition: Retirements**

Trustee LeeAnn Cole congratulated retiring staff for their years of service and commitment to the Peel DSB and thanked them for their work.

Resolution No. 23-66 moved by Lucas Alves  
seconded by Susan Benjamin

Resolved, that the following retirements be received:

Daniel Ambury	Richard Greenwood	Ingrid Mitchell
Janet Beaudry	Annie Grenier	Kathy Morrison
Anura Bellana	Karen Haight	Nick Nolfi
Kim Boyd	Harris Henry	Gregor Poole
Fiona Browning	Jan Ilnicki	Andrea Poulos Nagy
Peter Bursey	Pam Jagdeo	Darren Price
A Cameron	Manju James	Corina Proeller
Marcia Christie	Monica Johnson	Lynnis Romaniuk
Brenda Cliche	Sunita Joshi	Kamaljeet Singh
Dean Collacutt	Chris Kelman	Peter Spencer
Pat Couch	Eugene Korzinski	Cheryl Streete
Carmine Croce	Irene Latigo Odida	David Sweeting
Astte Drepaul	Theresa Longlade	Jackie Torresan
Natalie Fabro	Marie McDonald	Marie Vanderdoelen
Julia Favaro	Monique Melanson	Wayne Vincent
Claire Firgau	Michael Methot	Brenda Wainman
		Monika Zolis

..... carried



**10. Minutes of the Governance and Policy Committee**

Resolution No. 23-70 moved by Brad MacDonald  
seconded by Lucas Alves

Resolved, that the Minutes of the Governance and Policy Committee, held March 7, 2023, be received.

..... carried

**11. Motions for Consideration: Governance and Policy Committee, March 7, 2023**

At a meeting of the Governance and Policy Committee, held March 7, 2023, the following recommendations are brought for Board consideration:

Resolution No. 23-71 moved by Lucas Alves  
seconded by Karla Bailey

**1. Supporting Students with Prevalent Medical Conditions Policy**

Resolved, that the Supporting Students with Prevalent Medical Conditions Policy be approved. (APPENDIX I, Item 14.1(b) of the Agenda)

**2. Concussion Prevention and Intervention Policy**

Resolved, that the Concussion Prevention and Intervention Policy be approved, and replace Existing Policy 84 – Concussion Prevention and Intervention. (APPENDIX II Item 14.1(b) of the Agenda)

**3. Information Access and Privacy Policy**

Resolved, that the Information Access and Privacy Policy be approved, and replace Policy 88, Freedom of Information and Privacy Policy. (APPENDIX III Item 14.1(b) of the Agenda)

Resolution No. 23-72 ..... carried

**12. Minutes of the Curriculum, Equity and Student Well-Being Committee**

Resolution No. 23-73 moved by Jill Promoli  
seconded by Susan Benjamin

Resolved, that the Minutes of the Curriculum, Equity and Student Well-Being Committee, held March 8, 2023, be received.

.....

**12. Minutes of the Curriculum, Equity and Student Well-Being Committee (Continued)**

Trustee Jeffrey Clark apologized for his comment on racialized communities which was made at the last Curriculum, Equity and Student Well-Being Committee meeting. Chair Green commented that the Board is committed to providing training, including human rights training, for trustees.

.....

Resolution No. 23-73

..... carried

**13. Motions for Consideration: Curriculum, Equity and Student Well-Being Committee, March 8, 2023**

Resolution No. 23-74

moved by Will Davies  
seconded by Lucas Alves

At a meeting of the Curriculum, Equity and Student Well-Being Committee, held March 8, 2023, the following recommendations are brought for Board consideration:

**1. Delegation by Rowena Santos re Youth Mental Health Issues in Schools**

That, the Delegation by Rowena Santos re youth mental health issues in schools, be received and referred to the Director of Education for a report to be brought back to the Committee addressing the concerns raised by the delegation.

**2. Delegation by Laura Zeglen re Partnering Safe School Travel**

That, the Delegation by Laura Zeglen re Partnering for Safe School Travel: The Mississauga School Streets Pilot Project, be received and referred to the Director of Education.

**3. Delegation by Tyron Nimalakumar re Active and Sustainable School Transportation**

That, the Delegation re Active and Sustainable School Transportation be received and referred to the Governance and Policy Committee to bring back a report to the Committee on the feasibility of adopting the Active and Sustainable School Transportation Charter.

**4. Delegation by Idris Orughu re the Board's Multi-Year Strategic Plan**

That, the Delegation re the Board's Multi-Year Strategic Plan be received and referred to the Director of Education for a response as to whether the Board is committed to its current strategic plan.

**5. Secondary Final Evaluations 2022-2023**

That, the report re Secondary Final Evaluations 2022-2023, be received, and referred to the Governance and Policy Committee for review.

..... carried

**14. Directive 17 – Reform of the Guidance Program and System – Update #4**

Superintendent, Curriculum, Instruction and Assessment, Rasulan Hoppie, provided an update report on the progress of reformation of the Guidance Program system. He highlighted the continued development of the Black Excellence Guidance Resource Teacher position and ongoing communication to families with information on scholarships and bursaries. The work includes: sharing of resources to Guidance Counsellors; working with Instructional Coordinators, Transitions Resource Teacher, and community stakeholders; collaborative work aligned with the Black Student Success Strategy.

Trustees' questions of clarification were responded to regarding: completion date for a plan for Directive 17 for which a report will be brought to a future Board meeting; information on the number of current full-time and part-time vacant positions for Guidance Counsellors will be brought back; number of part-time and full-time Black Guidance Counsellors; percentage of increase in Black Guidance Counsellors that can be considered a success; the number of school-based Black Student Associations and Black Parent Associations; considerations to help prevent Guidance Counsellors being assigned to classrooms.

Resolution No. 23-75

moved by Lucas Alves  
seconded by Will Davies

Resolved, that the report re Directive 17 – Reform of the Guidance Program and System – Update #4, be received.

..... carried

**15. Overview of PDSB Mental Health and Well-being Strategy: Phase 3 Planning**

Acting Senior Manager of Social Emotional Learning, Janet Jackowski, and Coordinator for Student Well-being, Valerie Anderson, provided an overview of the Mental Health Strategy, which includes a review of previous priorities, leadership conditions and engagement, provincial strategy priorities and a plan in progress. Background information on the three phases of PDSB's Mental Health Strategy and findings that reveal a need for increased access to mental health supports for students were shared. The presenters highlighted that: the strategy will address the need for culturally relevant and responsive mental health support; third phase aligns with the Board Improvement and Equity Plan (BIEP), provincial mental health and addictions strategy, and the Ministry Directives. Next steps include a meeting between Core Mental Health Leadership Team and the Action Plan Steering Committee, the 2023-2026 Year 1 action plan will be launched in time for the next school year. A communications plan will be developed, and accountability measures will be determined as part of the process of writing the Strategy and Action Plan. Chair Green commented that Trustee Kathy McDonald has been appointed to work with the mental health strategy group, Trustee Brad MacDonald has been appointed to work on the Advisory Committee, and progress updates will be brought to the Board.

**15. Overview of PDSB Mental Health and Well-being Strategy: Phase 3 Planning (Continued)**

Comments and responses to questions of clarification from trustees included: lack of mental health support for students; suggestion for mental health nurses in schools; propose initiatives for inclusion in the next budget; shortage of mental health workers including psychologists; transfer payments from government were for the short-term but since this school year were changed to Grants for Student Needs (GSN) and a number of permanent positions have been hired this year; there are approximately 280 school-based Professional Student Services Personnel (PSSP) staff and 16 identity specific PSSP on the mental health team; PSSP staffing allocation is based on school capacity and information on caseload averages will be brought back to the Board. The suggestion to partner with municipalities to share funds and resources to support student mental health will be taken under advisement. Chair Green and trustees speaking encouraged support for mental health initiatives.

Resolution No. 23-76 moved by Will Davies  
seconded by Jill Promoli

Resolved, that the Report re Overview of PDSB Mental Health and Well-being Strategy: Phase 3 Planning, be received.

..... carried

**16. Peel Learning Foundation (PLF)**

Peel Learning Foundation Executive Director, Brian Hobbs, and Valerie Davis, Chair of the PLF Board, presented information on the poverty rate in Peel Region and explained that PLF, as a community-based charitable organization, raises funds to help Peel DSB students to achieve personal excellence by providing resources to help overcome barriers. The Foundation was launched in 2019 and has helped over 6,000 students in Peel through the Student Emergency Needs Program for basic necessities and the Student Backpack Program providing school supplies. Valerie Davis requested that the Board make Peel Learning Foundation the charity of choice.

Brian Hobbs requested that Peel DSB assign one day in the school year as Peel Learning Foundation Day when schools can hold fundraising events to support of the work of the Foundation, encourage a Payroll Deduction Campaign to help raise awareness among staff, and support a campaign to raise awareness of the Foundation within the entire Peel DSB system including parents. Chair Green thanked the presenters and offered to look into the request with trustees and the Director of Education to find ways to continue the partnership with the Foundation. Trustees expressed appreciation for the work of the Foundation and spoke in favour of the work being done. Responding to a query, Brian Hobbs clarified that financial donations from community organizations are welcome.

Resolution No. 23-77 moved by Will Davies  
seconded by Satpaul Singh Johal

Resolved, that the report re Peel Learning Foundation, be received.

..... carried

**17. Closed Session**

Resolution No. 23-78 moved by Karla Bailey  
seconded by Stan Cameron

Resolved, that the meeting move into Closed Session (21:47 hours).

..... carried

**18. Reconvene to Open Session**

Resolution No. 23-79 moved by Satpaul Singh Johal  
seconded by Susan Benjamin

Resolved, that the meeting reconvene into Open Session (22:45 hours).

..... carried

**19. Adoption of the Closed Session Report**

Resolution No. 23-80 moved by Satpaul Singh Johal  
seconded by Susan Benjamin

Resolved, that the report of the Closed Sessions re: Decisions in respect of negotiations with employee of the Board, Minutes of the Special Meeting of the Board Closed Session, held January 19, 2023, Minutes of the Board Meeting Closed Session, held January 25, 2023, Minutes of the Physical Planning, Finance and Building Committee Meeting (Closed) held February 1, 2023, be received, and the recommendations contained therein be approved.

..... carried

**20. Adjournment**

Resolution No. 23-81 moved by Stan Cameron  
seconded by Jill Promoli

Resolved, that the meeting adjourn (22:45 hours).

..... Chair ..... Secretary

**RESOLUTIONS APPROVED IN CLOSED SESSION, March 29, 2023**

Members present:

David Green, Board Chair  
LeeAnn Cole, Board Vice-Chair  
Lucas Alves  
Karla Bailey  
Susan Benjamin  
Stan Cameron

Jeffrey Clark (electronic)  
Will Davies  
Satpaul Singh Johal  
Brad MacDonald  
Kathy McDonald (electronic)  
Jill Promoli

**Part 1**

**1. Approval of Agenda**

That the agenda, be approved.

**2. Decisions in respect of Negotiations with Employee of the Board**

That, the employment of the teacher stated in the report be terminated for just cause, effective March 30, 2023.

**Part 2**

**1. Approval of Agenda**

That the agenda, be approved.

**2. Minutes (Closed Session)**

- (i) That, the Minutes of the Special Meeting of the Board (Closed), held January 19, 2023, be approved;
- (ii) That, the Minutes of the Board Meeting (Closed), held January 25, 2023, be approved;
- (iii) That, the Minutes of the Physical Planning, Finance and Building Committee Meeting (Closed), held February 1, 2023, be received.

**3. Personal Information regarding an Identifiable Individual (Oral)**

A confidential report about an identifiable individual was received.



## PEEL DISTRICT SCHOOL BOARD

Minutes of a meeting of the Special Education Advisory Committee of the Peel District School Board, held in the Brampton Room, the H. J. A. Brown Education Centre, 5650 Hurontario Street, Mississauga, Ontario on Tuesday, February 21, 2023, at 19:07 hours.

### Members present:

Shelley Foster, VOICE for Deaf and Hard of Hearing Children, Chair  
Fauzia Reza, Autism Ontario, Peel Chapter, Vice-Chair  
Nicole Buckett, Fragile X Research Foundation of Canada\*  
Jeffrey Clark, Trustee  
Jassie Gill, Ontario Parents of Visually Impaired Children  
Dorothy Peddie, FASworld Canada, Peel Chapter  
Satpaul Singh Johal, Trustee  
Mary Wright, Down Syndrome Association of Peel

### Members absent: (apologies received marked \*)

Barbara Cyr, Association for Bright Children, Peel Chapter\*  
Susan Benjamin, Trustee  
Jennifer Knight, Easter Seals Ontario\*  
Carol Ogilvie, Learning Disabilities Association of Peel Region\*  
Sinthusha Panchalingam, Canadian Mental Health Association, Peel  
Ann Smith, Brampton-Caledon Community Living\*

### Administration:

Jennifer Newby, Superintendent, Special Education, Social Emotional Learning and Well-Being (Executive Member)  
Paul da Silva, Associate Director, School Improvement and Equity, Special Education, Social Emotional Learning and Well-Being  
Kathryn Lockyer, General Counsel and Governance Officer  
Lorelei Fernandes, Board Reporter

### 1. **Approval of Agenda**

SE-17 moved by Dorothy Peddie  
seconded by Fauzia Reza

Resolved, that the agenda be approved.

..... carried

**2. Land Acknowledgement**

The Land Acknowledgement video was played.

**3. Conflict of Interest**

There were no declarations of conflict of interest.

**4. Minutes of the Special Education Advisory Committee Meeting, January 17, 2023**

SE-18 moved by Jeffrey Clark  
seconded by Mary Wright

Resolved, that the Minutes of the Special Education Advisory Committee Meeting, held January 17, 2023, be approved.

..... carried

**5. Written Questions, Notices of Motion, and Petitions**

There were no written questions, notices of motion, or petitions.

**6. SEAC Email in Process**

Jennifer Newby, Superintendent, Special Education, Social Emotional Learning and Well-Being, reported that staff are working on providing a dedicated SEAC email address and the information will be shared once it is in place.

**7. Supporting Students with Prevalent Medical Conditions Policy**

Jessica Jesudasan, Legal Counsel, Legal and Governance Services, presented background information on the proposed policy for supporting students with prevalent medical conditions such as anaphylaxis, asthma, diabetes, and/or epilepsy. She stated that this policy is further to Policy and Program Memorandum (PPM) 161, to promote safety and well-being of students and is linked to PPM 81 for provision of health support and PPM 149 which guides community-based partnerships. It is also an expectation of the Ministry of Education for school boards to develop and maintain a policy to support students with prevalent medical conditions. Jessica Jesudasan advised that this policy is connected to other Peel DSB Operating Procedures related to administration of prescribed medication and provision of assistance by third parties and external professionals and formalizes the Board's existing guidelines and protocols in this regard. Reviewing the draft policy, Jessica Jesudasan highlighted roles and responsibilities, required elements of the Plan of Care, supporting independent management of medical conditions, emergency response expectations, staff training, safety considerations, privacy and confidentiality, reporting and collection of data, and liability. The Policy is expected to be reviewed every five years.

**7. Supporting Students with Prevalent Medical Conditions Policy (Continued)**

Questions of clarification were responded to regarding response time for staff to assist a student in need under the Plan of Care, support for students who cannot self-administer medication on a case-by-case basis, and staff duty to report to authorities on probable negligence of proper care related to medical conditions.

SE-19 moved by Dorothy Peddie  
seconded by Jeffrey Clark

Resolved, that the report re Prevalent Medical Conditions Policy, be received.

..... carried

**8. Parent Protocol Review**

Due to staff unavailability, it was agreed to defer this item to a future meeting.

SE-20 moved by Mary Wright  
seconded by Dorothy Peddie

Resolved, that the oral report re Parent Protocol Review, be deferred to a future meeting.

..... carried

**9. SEAC Governance Orientation**

Kathryn Lockyer, General Counsel and Governance Officer, Legal and Governance Services, provided an overview of SEAC legislation and governance issues. She advised that the Ministry of Education is responsible for providing the regulatory and policy framework through the Education Act and Ontario Regulations. Kathryn Lockyer explained the duty of a school board to provide special education programs and services and the role of SEAC as a legislated advisory committee under Ontario Regulation 464/97. Reviewing the Regulation, she highlighted: SEAC membership rules; member qualifications and terms of office; requirement of ten meetings per year; roles and responsibilities of SEAC; filling of vacant seats; Peel DSB's governance directives; Board's responsibility to provide resources to SEAC. Kathryn Lockyer reviewed the rules for holding SEAC meetings, including quorum, voting, role of the chair and vice-chair, and rules of order for effective meetings as outlined in legislation, Board By-laws and/or Roberts Rules of Order. She described the process for proposing a motion or notice of motion and spoke about the importance of including proposed items on the meeting agenda.

Kathryn Lockyer responded to questions of clarification on the process for a notice of motion, adding items to the agenda, and a quick reference guide. She advised that Peel DSB's Procedure By-law is available on the board's website.

**9. SEAC Governance Orientation (Continued)**

SE-21 moved by Jassie Gill  
seconded by Jeffrey Clark

Resolved, that the oral report re SEAC Governance Orientation, be received.

..... carried

**10. SEAC Membership Callout**

Superintendent Newby announced that Peel DSB is currently accepting applications from qualified organizations to join PDSB's Special Education Advisory Committee (SEAC). Referring to the report, she noted that SEAC usually meets on the third Tuesday of the month, and not the second Tuesday of the month. The report will be amended accordingly.

There was a brief discussion on adding Members at Large to the SEAC membership, and clarification was provided on their eligibility to vote. Chair Foster suggested that the discussion on adding Members at Large be postponed to a meeting at which more SEAC members are present, to allow for more participation. She asked SEAC members to share this information through networking and to bring back suggestions on how this proposal will best serve the student population.

SE-22 moved by Dorothy Peddie  
seconded by Satpaul Singh Johal

Resolved, that the report re SEAC Membership Callout, be received.

..... carried

**11. Superintendent's Report**

Superintendent Newby reported that the membership callout for filling the vacant seat at SEAC is now live and submissions must be received by March 16, 2023. The callout provides an opportunity for members of the disability community and their allies to have a voice within the board and to diversify and seek out organizations which can enhance the school experiences of students and their care givers. Jennifer Newby provided information on a tutoring program provided to students with special needs to improve their learning ability and noted that the program receives dedicated Ministry funding.

In regard to Peel DSB's Accessibility for Ontarians with Disabilities Act (AODA) Committee, SEAC has been invited to send one representative and an alternate to participate. The Committee also requires one trustee and an alternate trustee to be appointed. The AODA Committee will be co-chaired by the Controller of Facilities and Maintenance Support Services and the Superintendent of Special Education Services. Board staff on this committee will include the Manager of Health, Wellness and Safety, Manager of Human Rights, Manager of Planning and Accommodation, and Assistant Controller of Maintenance and Facilities Projects Services.

**11. Superintendent’s Report (Continued)**

Jennifer Newby stated that this year the Committee will be tasked with developing a Multi-year AODA Plan. Responses to questions of clarification included: Ministry funding provided in Fall 2022 is being used for tutoring from March to June 2023; GLD classes being phased out and funds being used to support students in GLD classes to prepare them to join mainstream classes; consideration can be given to science-based learning; criteria and qualifications for SEAC membership must be met; paper-based SEAC application process to enable applicants who may not have access to electronic devices to apply; the SEAC membership call-out posted on various social media and the Board’s website and the information circulated to all PDSB staff. Regarding the query about notifying organizations who were not successful in the past, it was clarified that in addition to the Board’s efforts to release the membership callout through the website and social media, the information can be shared by word of mouth and those organizations can re-apply.

SE-23 moved by Jassie Gill  
seconded by Satpaul Singh Johal

Resolved, that the Superintendent’s oral report, be received.

..... carried

**12. Questions Asked by Committee Members**

Chair Foster encouraged members to discuss their questions or ideas with her before the meeting, to determine the best way to bring them forward at SEAC meetings.

**13. Motion / Action Log**

Reviewing the report, Superintendent Newby drew attention to the revised structure of the Motion/Action Log. She explained the process for updating the Log, noting that in each month’s report, the current question and answer will be listed and previous ones will be dropped; new and/or unanswered questions will continue to remain on the Log until answers are provided.

SE-24 moved by Dorothy Peddie  
seconded by Mary Wright

Resolved, that the report re Motion/Action log, be received.

..... carried

**14. Adjournment**

SE-25 moved by Jassie Gill  
seconded by Jeffrey Clark

Resolved, that the meeting adjourn. (20:25 hours)

..... carried

..... Chair

## PEEL DISTRICT SCHOOL BOARD

Minutes of a meeting of the Audit Committee of the Peel District School Board, held in the Brampton Room, the H. J. A. Brown Education Centre, 5650 Hurontario Street, Mississauga, Ontario on Thursday, March 9, 2023, at 15:00 hours.

Members present:

Lucas Alves  
Stan Cameron  
Will Davies  
Pradeep Sinha

Member absent (apologies received)

Aine Sachdev

Also present:

Paula Hatt, Senior Manager, Regional Internal Audit Team  
Jill Promoli, Trustee

Administration:

Jaspal Gill, Associate Director, Operations and Equity of Access (Executive Member)  
Tania Alatishe-Charles, Controller, Finance Support Services (Executive Back-up Member)  
Kathryn Lockyer, General Counsel and Governance Officer  
Renée Lucas, Senior Internal Auditor

Lorelei Fernandes, Board Reporter

### 1. Call to Order

Jaspal Gill, Associate Director, Operations and Equity of Access called the meeting to order at 15:00 hours. He welcomed everyone to the first Audit Committee meeting for 2023.

### 2. Acknowledgement of Traditional Lands

The video on the Acknowledgement of Traditional Lands was viewed.

### 3. Election of Chair and Vice-Chair

Internal Auditors, Tony Ronca and Carlo Avolio, were present to act as scrutineers.

Associate Director Gill called for nominations for the position of Chair of the Audit Committee. He noted that members elected as Chair and Vice-Chair will hold office for a two-year term.

**3. Election of Chair and Vice-Chair (Continued)**

Trustee Stan Cameron nominated Trustee Will Davies.

There were no further nominations.

The nomination of Trustee Davies for the position of Chair of the Audit Committee was moved by Stan Cameron and seconded by Pradeep Sinha.

AC-01 moved by Stan Cameron  
seconded by Will Davies

Resolved, that the nomination for the position of Chair of the Audit Committee be closed.

..... carried

Trustee Will Davies was acclaimed as Chair of the Audit Committee.

Associate Director Gill called for nominations for the position of Vice-Chair of the Audit Committee.

Trustee Will Davies nominated Pradeep Sinha.

There were no further nominations.

The nomination of Pradeep Sinha for the position of Vice-Chair of the Audit Committee was moved by Stan Cameron and seconded by Will Davies.

AC-02 moved by Will Davies  
seconded by Stan Cameron

Resolved, that the nomination for the position of Vice-Chair of the Audit Committee be closed.

..... carried

Pradeep Sinha was acclaimed as Vice-Chair of the Audit Committee.

**4. Approval of Agenda**

Trustee Will Davies took the Chair.

AC-03 moved by Stan Cameron  
seconded by Pradeep Sinha

That, the agenda be approved.

..... carried



**5. Declaration of Conflict of Interest**

There were no declarations of conflict of interest.

**6. Minutes of the Audit Committee Meeting, November 14, 2022**

AC-04 moved by Pradeep Sinha  
seconded by Stan Cameron

That, the Minutes of the Audit Committee meeting, held November 14, 2022, be approved.

..... carried

**7. Audit Committee Work Plan**

Controller of Finance Support Services, Tania Alatishe-Charles, stated that the Work Plan covers requirements under Ontario Regulation 361/10 for Audit Committees. She reviewed the report and provided updates on the work slated for 2023.

AC-05 moved by Pradeep Sinha  
seconded by Stan Cameron

That, the report re Audit Committee Work Plan, be received.

..... carried

**8. Regional Internal Audit Team (RIAT) Charter**

Paula Hatt, Senior Manager, Regional Internal Audit Team, stated that the RIAT Charter is an Internal Audit requirement and needs to be reviewed periodically. She advised that due to changes to the Provincial RIAT charter, today's report includes the suggested changes for review and highlighted that the word 'mandate' has been replaced with 'charter', Paula Hatt noted that a Coordinating Steering Committee helps to oversee RIAT. Responding to member's query, Paula Hatt advised that the Coordinating Steering Committee was created a year ago and consists of senior business officials from six school boards in the region who meet about every two months during the school year to discuss RIAT items such as regional internal budget, internal quality assurance, and September Report. On a question about fraud risk, Controller Alatishe-Charles explained the various types of potential risks and the controls that are put in place to mitigate them. Associate Director Gill added that it is the responsibility of staff to keep the Audit Committee apprised if fraud occurs.

AC-06 moved by Stan Cameron  
seconded by Pradeep Sinha

That, the report re Regional Internal Audit Team (RIAT) Charter, be received.

..... carried

**9. 2022 Annual Report of Access Requests – Municipal Freedom of Information and Protection of Privacy Act**

Kathryn Lockyer, General Counsel and Governance Officer, stated that the purpose of the report is to provide data on Access to Information Requests under the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA), as part of accountability and good governance framework. She advised that in 2022 the Board received 16 requests which were completed within the legislated timeline, one request is being appealed, two requests were abandoned, and a total of \$293 in fees was received for access to records.

AC-07 moved by Stan Cameron  
seconded by Pradeep Sinha

That, the report re 2022 Annual Report of Access Requests – Municipal Freedom of Information and Protection of Privacy Act, be received.

..... carried

**10. Closed Session**

AC-08 moved by Pradeep Sinha  
seconded by Stan Cameron

That, the Committee move into Closed Session (15:20 hours).

..... carried

The Committee moved back into Open Session at 15:30 hours on a motion by Trustee Cameron.

**11. Rise and Report from Closed Session**

AC-09 moved by Stan Cameron  
seconded by Pradeep Sinha

That, the report of the Closed Session re Internal Audit Service Summary, and PDSB Regional Internal Audit Update March 2023, be received, and that the recommendations contained therein, be approved.

..... carried

March 9, 2023  
Audit Committee:lf

**12. Adjournment**

AC-10 moved by Stan Cameron  
seconded by Pradeep Sinha

That, the meeting adjourn (15:33 hours).

..... carried

..... Chair

## PEEL DISTRICT SCHOOL BOARD

Minutes of a meeting of the Physical Planning, Finance and Building Committee of the Peel District School Board. The hybrid meeting was held in the Brampton Room, the H. J. A. Brown Education Centre, 5650 Hurontario Street, Mississauga, Ontario on Tuesday, April 4, 2023, at 17:00 hours.

Members present:

Also present:

Stan Cameron, Chair  
Satpaul Singh Johal, Vice-Chair  
Karla Bailey  
Will Davies  
Brad MacDonald (electronic)  
Jill Promoli

Susan Benjamin

Administration:

Jaspal Gill, Associate Director, Operations and Equity of Access (Executive Member)  
Tania Alatishe-Charles, Controller, Finance Support Services  
Wendy Dobson, Acting Controller, Corporate Support Services  
Kathryn Lockyer, General Counsel and Governance Officer  
Thomas Tsung, Controller, Facilities and Environmental Support Services  
Sabrina Valleau, Governance Coordinator

Lorelei Fernandes, Board Reporter

### 1. Call to Order

Chair, Stan Cameron called the meeting to order at 17:00 hours.

### 2. Physical Planning, Finance and Building Committee (Closed Session)

PB-14 moved by Will Davies  
seconded by Brad MacDonald

Resolved, that the Committee move into the Closed Session (17:00 hours).

The meeting recessed at 17:15 hours and reconvened into Open Session at 17:30 hours.

### 3. Rise and Report from Closed Session

PB-15 moved by Karla Bailey  
seconded by Jill Promoli

Resolved, that the report of the Closed Session re Tender Activity Report for the period January 1, 2023, to February 1, 2023, be received.

..... carried

**4. Acknowledgement of Traditional Lands**

The video on the Acknowledgement of Traditional Lands was viewed.

**5. Approval of Agenda**

Item 9.5, School Bus Tracking App, was added to the agenda.

PB-16 moved by Satpaul Singh Johal  
seconded by Will Davies

Resolved, that the agenda, as amended, be approved.

..... carried  
2/3rds' majority

**6. Conflict of Interest**

There were no declarations of conflict of interest.

**7. Minutes of Student Transportation of Peel Region – Governance Committee Meeting, November 28, 2022**

PB-17 moved by Brad MacDonald  
seconded by Karla Bailey

Resolved, that the Minutes of the Student Transportation of Peel Region – Governance Committee Meeting, held November 28, 2022, be received.

..... carried

**8. Minutes of the Physical Planning, Finance and Building Committee Meeting, February 1, 2023**

PB-18 moved by Will Davies  
seconded by Jill Promoli

Resolved, that the Minutes of the Physical Planning, Finance and Building Committee Meeting, held February 1, 2023, be approved.

..... carried

**9. Permit Fees - Update**

Wendy Dobson, Acting Controller, Corporate Support Services, advised that schools offer communities the use of space outside regular school hours to conduct programs, community events and activities. She referred to Policy 42, Community Use of Facilities, which requires that rental rates and permit fees be reviewed and amended to reflect school operational costs for community use. The last analysis and adjustment of permit fees was completed in 2012 and since then operating costs have increased significantly. Wendy Dobson stated that starting September 2023 Peel DSB will amend the rates to align with the coterminous board as a necessary adjustment given the current fiscal realities. This information will be communicated to all community users at the end of April 2023. Wendy Dobson added that permit fees continue to be structured to encourage community-based activities in schools to support non-profit groups.

Questions of clarification from trustees were responded to regarding consideration for non-profit organizations and seniors' groups. It was explained that the rates are being amended to recover rental costs as board funds have reduced due to enrolment decline since Covid began, and that if the Board continues to subsidize community programs, available funds for classroom resources will be affected. Furthermore, it was noted that there has been no increase in fees for the past 11 years. Responses to further questions included: that based on the Board's current permit fees, costs for community use are being subsidized; there has been no increase in Ministry funding to support rising costs; even with the proposed new rates the school board's permit fees will be significantly lower than those charged by Peel municipalities; communication on resumption of facilities' use will be sent to community users; enrolment projections and reasons for loss of pupils in Peel; decline in enrolment is being experienced by all school boards in Greater Toronto Area.

PB-19 moved by Jill Promoli  
seconded by Satpaul Singh Johal

Resolved, that the update report re Permit Fees, be received.

..... carried

**10. Application Status Update**

Zack Tessaro, Planner, Development, stated that the information report includes a list of development applications for January-February 2023 with location map and letters to the respective municipalities. He advised that the anticipated number of students that will be generated was either included in the previous projections and sufficient school accommodation is in place or will be provided by new schools approved in the Board's Annual Planning Document. Responding to a trustee's question about how a school's capacity is calculated, Associate Director Gill advised that classroom capacity is based on Ministry Rated Capacity (MRC) set by Ministry guidelines. Chair Cameron commented that portables are added where the number of students exceeds the classroom capacity, and the number of portables is determined by the municipality. On a question by a trustee, Zack Tessaro clarified that the letters to the municipalities are first submissions and can be updated later. A suggestion was made to consider families living in basements to ensure sufficient accommodation and increase safety of students at bus stops.

**10. Application Status Update (Continued)**

A member commented that as a practice, trustees do not attend public meetings regarding re-zoning, and the re-zoning process includes receipt of information from the City followed by an Accommodation Review by Planning staff.

PB-20 moved by Karla Bailey  
seconded by Jill Promoli

Resolved, that the Application Status Update report, be received.

..... carried

**11. Tender Activity Report**

PB-21 moved by Satpaul Singh Johal  
seconded by Jill Promoli

Resolved, that the Tender Activity Report for the period January 1, 2023 to February 28, 2023, be received.

..... carried

**12. Vandalism Activity Report**

Controller Wendy Dobson presented the reports for November and December 2022 and highlighted the differences showing significant reduction in costs in December due to closure of schools in the winter break. Wendy Dobson responded to questions of clarification on thefts, illegal dumping, miscellaneous damage and third-party damage.

PB-22 moved by Karla Bailey  
seconded by Jill Promoli

Resolved that, the Vandalism Activity Report for April 2022, be received.

..... carried

**13. School Bus Tracking App**

Roy Wierenga, General Manager of Student Transportation of Peel Region (STOPR) presented information on Chipmunk, a bus tracking app which allows tracking of a school bus location using GPS technology in real time and is available on all Apple and Android platforms. Navigating the screens, he demonstrated how the app works and how the technology provides information to the public, including Estimated time of Arrival (ETA). The app will be released for use in the week of April 17, 2023 and will be tested over May and June by Peel DSB and Dufferin-Peel DSB. Wendy Dobson stated that information on the first Peel schools that will test implementation of the app will be communicated to school administration, senior administration, and trustees.

**13. School Bus Tracking App (Continued)**

Questions of clarification responded to included that, security of students from non-custodial parents will be safeguarded by limited access to the app and the STOPR bus planner database.

PB-23 moved by Will Davies  
seconded by Satpaul Singh Johal

Resolved that, the oral report re School Bus Tracking App, be received.

..... carried

**14. Response to Delegation by Laura Bowman regarding Air Quality in Schools**

PB-24 moved by Jill Promoli  
seconded by Karla Bailey

Resolved that, the Response to Delegation by Laura Bowman regarding Air Quality in Schools, be received.

..... carried

**15. Adjournment**

PB-25 moved by Satpaul Singh Johal  
seconded by Karla Bailey

Resolved, that the meeting adjourn (18:45 hours).

..... carried

..... Chair



## PEEL DISTRICT SCHOOL BOARD

Minutes of a meeting of the Governance and Policy Committee of the Peel District School Board, held on Wednesday, April 12, 2023, at 18:31 hours. The hybrid meeting was held in the Brampton Room, the H. J. A. Brown Education Centre, 5650 Hurontario Street, Mississauga, Ontario, and by electronic means, under Ontario Regulation 463/97.

Members present:

Brad MacDonald, Chair  
Lucas Alves, Vice-Chair  
Karla Bailey  
Susan Benjamin  
Jeffrey Clark  
David Green, Board Chair (electronic)  
Kathy McDonald (electronic)

Also present:

Will Davies  
Jill Promoli

Administration:

Kathryn Lockyer, General Counsel and Governance Officer (Executive Member)  
Donna Ford, Superintendent of Education

Nicole Fernandes, Board Reporter

**1. Call to Order**

Chair MacDonald called the meeting to order.

**2. Acknowledgement of Traditional Lands**

The Land Acknowledgement was read.

**3. Approval of Agenda**

GC-16            Moved by Lucas Alves  
                          Seconded by Karla Bailey

Resolved, that the agenda be approved.

..... carried

**4. Conflict of Interest**

There were no declarations of conflict of interest.

**5. Minutes of the Governance and Policy Committee Meeting, March 7, 2023**

It was noted that Trustee Jill Promoli was also present at the March 7, 2023, Committee meeting. The minutes will be amended.

GC-17            Moved by Susan Benjamin  
                         Secoded by Karla Bailey

Resolved, that the Minutes of the Governance and Policy Committee Meeting, held March 7, 2023, as amended, be approved.

..... carried

**6. Repeal of Policy 3 – Appointment of Administrative and Supervisory Personnel**

GC-18            Moved by Lucas Alves  
                         Secoded by Jeffrey Clark

Resolved, that the Governance and Policy Committee recommends to the Board:

That, Policy 3 – Appointment of Administrative and Supervisory Personnel, attached as Appendix A, be repealed. (APPENDIX I, Item 7.1 of the agenda)

.....

Providing background information, Kathryn Lockyer, General Counsel and Governance Officer, reported that Policy 87, Board of Trustees’ Participation on Hiring, Appointment and Promotion Panels, was approved by the Board at the May 26, 2020 meeting, in response to Directive 2 of the Ministry directives requiring Board members to immediately cease participation on hiring, promotion, and appointment panels for any Peel DSB employee other than the Director of Education, and establish a policy in this regard. Kathryn Lockyer advised that Policy 3, Appointment of Administrative and Supervisory Personnel, is inconsistent with Directive 2 and Policy 87, as it provides for Board members to serve on interview panels for appointment of principals and vice-principals, and supervisory staff. Policy 3 is therefore being recommended for repeal. Additional guidelines specified within Policy 3 will be written into operating procedures.

Kathryn Lockyer responded to questions of clarification, including: Policy 3 was approved in 1969, with the last revision in 2019; hiring of staff is an operational matter undertaken in accordance with the *Education Act*; elements of Policy 3 relating to academic qualifications, professional experience, etc. are based on the *Education Act*, Policy and Program Memoranda, and ministry directives. Following a suggestion about setting metrics, guidelines, or standards for hiring of administrative and supervisory personnel, an amendment was moved:

GC-19            Moved by Lucas Alves  
                         Secoded by Jeffrey Clark

Resolved, that Motion GC-18 be amended to add: That, the administration bring back a report on standards for hiring administrative and supervisory staff, as guidelines.

.....

**6. Repeal of Policy 3 – Appointment of Administrative and Supervisory Personnel**  
(Continued)

During the discussion that followed, some trustees stated that by setting standards for hiring, Board members will be involved in the appointment of administrative and supervisory staff, which is contrary to Directive 2 from the Ministry. Other trustees indicated that the administration is being asked for a report only, at this time. It was acknowledged that Peel DSB was one of the very few school boards with trustees on panels for hiring staff other than the Director of Education. Kathryn Lockyer confirmed that the repeal of Policy 3 is consistent with practice at most school boards, and with Directive 2.

.....

GC-19 ..... carried

GC-18 (as amended)\* ..... carried

\*Resolution No. GC 18 now reads:

Resolved, that the Governance and Policy Committee recommends to the Board:

- (i) That, Policy 3 – Appointment of Administrative and Supervisory Personnel, attached as Appendix A, be repealed. (APPENDIX I, Item 7.1 of the agenda).
- (ii) That, the administration bring back a report on standards for hiring administrative and supervisory staff, as guidelines.

**7. Naming and Renaming of Schools, Special Function Areas, and Facilities Policy**

Superintendent of Education, Donna Ford noted that the Naming and Renaming of Schools, Special Function Areas, and Facilities Policy is brought back following consideration of the feedback provided by this Committee. She advised that the Committee expressed a preference that schools are not named after people. Members had also requested specifying the process prior to initiating naming or renaming by the Director of Education, defining a special function area, and indicating the potential composition of the Naming Committee. She confirmed the commitment to engaging with the community, in accordance with the Community Engagement Policy, which is currently being developed.

A lengthy discussion ensued, and the administration responded to questions of clarification and feedback on further changes to the proposed revised Policy. Kathryn Lockyer advised that 'may' is used for possibility, whereas 'shall' is a directive, and she provided the legal definition of 'reasonable'. A trustee noted that a timeline is not provided for assessing the submission by the Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or their designate. Suggestions were made to include language referring to a reasonable time or a time not to exceed six months. Trustees also discussed whether there was need to further clarify the prohibition as indicated in sub-sections 5.9(c) and (d), given the broad prohibition on using names of individuals, current Peel DSB employees or Board members in sub-section 5.9(a). Comments were made about streets named after individuals, and that the prohibition should cover cases when the first names or last names can be linked to identifiable individuals. A trustee suggested that, while there may be duplication in language in the sub-sections, it is important to emphasize the rationale for the prohibition.

**7. Naming and Renaming of Schools, Special Function Areas, and Facilities Policy**  
(Continued)

Replying to a question of clarification regarding the composition of the Naming Committee which may include a number of stakeholders, Superintendent Ford stated that the intention is to create as much engagement and involvement as possible, and some stakeholders may not be available to attend meetings. Kathryn Lockyer suggested that the language be changed so that stakeholders listed in Section 6.11 must be provided an opportunity to sit on the Naming Committee. She added that a name proposed by the Naming Committee is brought to the Physical Planning, Finance and Building Committee for recommendation to the Board for approval. As such, there are sufficient checks and balances at different stages to ensure that the process is adequately followed.

GC-20            Moved by Karla Bailey  
                      Seconded by Lucas Alves

Resolved, that Section 5.4 be amended to read:

The Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or their designate alongside the appropriate site lead and Superintendent of Education, where applicable, will assess the submission within a reasonable time, not exceeding six (6) months.

..... carried

GC-21            Moved by Jeffrey Clark  
                      Seconded by Karla Bailey

Resolved, that Section 5.9 be amended to reflect that Section 5.9(a) refers to names of individuals, with separate categories for current Peel DSB employees, Board members, and Sections 5.9(c) and 5.9(d), to ensure clarity regarding the prohibition on the use of names.

..... carried

GC-22            Moved by Karla Bailey  
                      Seconded by Jeffrey Clark

Resolved, that Section 6.11 be amended from “Members of the Naming Committee may include”, to “The following individuals shall be offered the opportunity to sit on the Naming Committee”.

..... carried

(Continued overleaf)

**7. Naming and Renaming of Schools, Special Function Areas, and Facilities Policy**  
(Continued)

GC-23 Moved by Lucas Alves  
Seconded by Susan Benjamin

Resolved, that the Governance and Policy Committee recommends to the Board:

- (i) That, the Naming and Renaming of Schools, Special Function Areas, and Facilities Policy, as amended, be approved, and replace existing Policy 27 – Naming of Schools.
- (ii) That, the Naming and Renaming of Schools, Special Function Areas, and Facilities Procedure, be received for information.  
(APPENDIX II, Item 7.2 of the agenda)

**8. Student Registration and Admission Policy**

Elizabeth England, Coordinating Principal, Curriculum, Instructional and Community Supports, noted that the purpose of the proposed Student Registration and Admission Policy is to facilitate registration and admission placements, and withdrawal of eligible Peel DSB students in accordance with the requirements of the *Education Act (Act)* and associated Policy and Program Memoranda and guidance documents. The proposed Policy will be interpreted in a manner consistent with Board policies and procedures, the *Act*, *Ontario Human Rights Code*, and applicable legislation. It will apply to all students and/or parents/guardians applying for and/or accepted for enrolment and admission to the Peel DSB and all staff involved in the processing of applications, registration, and admission of students. Elizabeth England reviewed the highlights of the proposed Policy and noted that it will be operationalized through procedures to ensure schools are aware of legal requirements and parameters for school admission.

Members' questions of clarification were responded to regarding: admission for students without legal immigration status is covered in the operating procedure; training has been coordinated for the Welcome Centres to ensure that staff are aware of the procedures and processes; students must have acceptable identification documents, including proof of date of birth; administration is working on a procedure for students enrolled in virtual school in compliance with procedures.

GC-24 Moved by Lucas Alves  
Seconded by Susan Benjamin

Resolved, that the Governance and Policy Committee recommends to the Board:

That, the Student Registration and Admission Policy, attached as Appendix A, be approved. (APPENDIX III, Item 7.3 of the agenda)

..... carried

## 9. Artificial Intelligence and Plagiarism

LaShawn Murray, Policy Analyst, provided an overview of the recognition of Artificial Intelligence (AI) systems in any Peel DSB policy regarding plagiarism. She outlined the definition of AI, and reported that ChatGPT is an example of generative AI, able to produce new content including text, images, music and audio. Stating that the recent launch of ChatGPT has raised concerns about the implications of AI generated content in relation to plagiarism and academic dishonesty, she advised that the Peel DSB does not have a policy that exclusively addresses plagiarism. LaShawn Murray noted that plagiarism is referenced within Policy 14, Student Assessment, Evaluation, and Reporting in Peel Elementary Schools, which outlines the responsibilities of educators and school teams to communicate expectations for original student content and provides guidance when students plagiarize or cheat. Plagiarism is also referenced in the Student Code of Conduct and the Digital Citizenship Policy. Use of AI generated content without attribution or representation of content as original work would constitute plagiarism or academic dishonesty under the Student Assessment, Evaluation and Reporting in Peel Elementary and Secondary Schools Policy, and the Code of Conduct. LaShawn Murray stated that the absence of an explicit reference to AI and plagiarism is a gap within existing policies, and can inform upcoming reviews of policies as well as offer an opportunity to develop a new policy on plagiarism. She confirmed that the administration will continue to monitor the external environment as it relates to AI in education and Peel DSB policies.

A trustee commented on the need to have separate policies for staff and students with regard to AI and plagiarism. He spoke of the potential to use AI chatbots to generate external content, which poses a risk to organizational reputation in the event of dissemination of incorrect or inappropriate publication of information. He expressed the opinion that this issue is different from the matter of plagiarism and AI in classrooms. Further discussion related to whether grade levels will be referenced, and whether software is available to detect AI generated content.

GC-25            Moved by Lucas Alves  
                          Seconded by Karla Bailey

Resolved, that the report re Artificial Intelligence and Plagiarism, be received.

..... carried

## 10. Identity-Based Data Collection Policy

Reviewing the draft Identity-Based Data Collection Policy, LaShawn Murray highlighted the value of collecting identity-based data, including: understanding diversity; identifying gaps and barriers; informing actions to assess and address disproportionalities and inequities. She noted that the Board currently collects identity-based data pertaining to Indigenous identity, ethnicity, race, gender, sexual orientation, religion and disability. To support the ongoing collection and use of identity-based data of students, staff and trustees, the Identity-Based Data Collection Policy has been drafted. LaShawn Murray highlighted the purpose of the draft Policy, and noted that it builds upon the work of past policy consultations. She invited the Committee's feedback on the draft Policy, and indicated that consultations are ongoing with all Peel DSB stakeholders, and through an online survey for the broader Peel community.

**10. Identity-Based Data Collection Policy (Continued)**

GC-26            Moved by Jeffrey Clark  
                      Seconded by Karla Bailey

Resolved, that the report re Identity-Based Data Collection Policy, be received.

..... Carried

**11. Policy Management Program Update**

LaShawn Murray stated that, as evidence of good governance, the Legal and Governance Services department is currently developing and implementing the new Policy Management Program, which will: provide the framework for a systematic approach to the development, review, approval and repeal of policies; establish naming and numbering conventions; identify and address gaps; ensure all procedures are updated; schedule predetermined review of policies and procedures. LaShawn Murray reported that Director’s Council has approved three procedures to operationalize the Program. The Policy Development and Review Framework established the new identification system and formatting requirements for all policies, procedures, and related forms. The Policy Development and Review Procedure outlines the stages of the process from identification of a policy need, to approval, communications, and implementation. The Procedure Development and Review Procedure details the stages of the process from identification of the need for a procedure, to approval, communications, and implementation. LaShawn Murray responded to members’ questions of clarification, advising that the Policy Development and Review Framework requires that policies and procedures are to be reviewed every five years, or earlier if there are changes to relevant regulation. A master schedule is being developed that will help to notify responsible departments that their policies and procedures are due for review. She confirmed that an environmental scan was undertaken of several school boards, including the policy development review process of the Toronto DSB.

GC-27            Moved by Karla Bailey  
                      Seconded by Susan Benjamin

Resolved, that the update report on the Policy Management Program, be received.

..... carried

**12. Records Retention Schedule**

Oriana Sharp, Privacy and Information Officer, advised that the Education Act requires school boards to institute a program of records management that will establish schedules for retention, disposition, and eventual destruction of school board records. A records retention schedule will ensure the protection of records vital to the administration and governance of the Board, protection of valuable historical records, and ensure a common expectation of available and accessible information. Oriana Sharp noted that the Peel DSB Records Retention Schedule is based largely on the Generic Records Retention Schedule developed by the Privacy and Information Management Committee of the Ontario Association of School Boards Officials.

**12. Records Retention Schedule (Continued)**

Oriana Sharp explained that the Records Retention Schedule is categorized by business function, and categories will be added, if needed, in consultation with business sections. She stated that all Board staff shall comply with the retention periods specified in the Schedule, ensuring that official records in their custody or control are protected from inadvertent destruction or damage, and obsolete and transitory records are disposed of in a systematic and controlled manner.

GC-28            Moved by Karla Bailey  
                      Seconded by Susan Benjamin

Resolved, that the Governance and Policy Committee recommends to the Board:

That, the Records Retention Schedule, attached as Appendix A, be approved and adopted as a by-law. (APPENDIX IV, Item 7.7 of the agenda)

..... carried

**13. Notices of Motions**

Chair MacDonald advised Committee members that notices of motion are to be submitted 48 hours prior to agenda distribution. Therefore, notices of motion are to be submitted to Legal and Governance Services staff seven days prior to the meeting.

Trustee Alves stated that, arising from concerns raised by parents, he will be bringing forward a Notice of Motion at the next Committee meeting requesting the development of a policy that will govern school assemblies, and the provision of notice to parents regarding matters addressed during school assemblies.

**14. Adjournment**

GC-29            Moved by Lucas Alves  
                      Seconded by Karla Bailey

Resolved, that the meeting adjourn (20:29 hours).

..... carried

..... Chair



## **MOTIONS FOR CONSIDERATION: GOVERNANCE AND POLICY COMMITTEE**

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At a meeting of the Governance and Policy Committee, held April 11, 2023, the following recommendations resulted and are brought for Board consideration:

**1. Repeal of Policy 3 – Appointment of Administrative and Supervisory Personnel**

- (i) That, Policy 3 – Appointment of Administrative and Supervisory Personnel, attached as Appendix A, be repealed. (APPENDIX I).
- (ii) That, the administration bring back a report on standards for hiring administrative and supervisory staff, as guidelines.

**2. Naming and Renaming of Schools, Special Function Areas, and Facilities Policy**

- (i) That, the Naming and Renaming of Schools, Special Function Areas, and Facilities Policy, as amended, be approved, and replace existing Policy 27 – Naming of Schools.
- (ii) That, the Naming and Renaming of Schools, Special Function Areas, and Facilities Procedure, be received for information.  
(APPENDIX II)

**3. Student Registration and Admission Policy**

That, the Student Registration and Admission Policy, attached as Appendix A, be approved. (APPENDIX III)

**4. Records Retention Schedule**

That, the Records Retention Schedule, attached as Appendix A, be approved and adopted as a by-law. (APPENDIX IV)

Submitted by:

Kathryn Lockyer  
General Counsel and Governance Officer

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## 7.1

Governance and Policy Committee Meeting, April 12, 2023

# Repeal of Policy 3 - Appointment of Administrative and Supervisory Personnel

**Strategic Alignment:**

Ministry Directive 2

**Report Type:**

Recommendation

*Prepared by:* Kathryn Lockyer, General Counsel and Governance Officer

*Submitted by:* Rashmi Swarup, Director of Education

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## Overview

### **Recommendation:**

That Policy 3, Appointment of Administrative and Supervisory Personnel, attached as Appendix A, be repealed.

### **Background:**

Directive 2 of the Ministry Directives states:

“The members of the Board shall immediately cease to participate on hiring, promotion and appointment panels, including temporary or acting positions, except for the position of Director of Education. The Board shall establish a policy restricting members of the Board from participating on hiring promotion and appointment panels, for positions, other than the Director of Education.”

In response to Directive 2, in 2020, Policy 87 – Board of Trustees Participation on Hiring, Appointment and Promotion Panels, was approved which restricts members of the Board from participating on hiring, promotion and appointment panels, for any positions, including temporary or acting positions, other than the Director of Education.

Policy 3 directs that a minimum of one member of the Board of Trustees serve as part of the interview panel for the appointment of principals and vice-principals and that four trustees form part of a committee that carries out interviews for the appointment to senior supervisory staff positions. As Policy 3 is inconsistent with the requirements of Policy 87 and the Ministry Directives. The policy is being recommended for repeal. Additional guidelines as specified within Policy 3 will be rewritten as procedures and approved by Director’s Council.

## Next Steps

### **Communications:**

Upon repeal, Policy 3 - Appointment of Administrative and Supervisory Personnel, will be archived and removed from the Peel websites.

## Appendices

Appendix A – Policy 3 – Appointment of Administrative and Supervisory Personnel

## APPOINTMENT OF ADMINISTRATIVE AND SUPERVISORY PERSONNEL

### Statement of Policy

The Peel District School Board approves the establishment of guidelines for the appointment of supervisory and administrative personnel. Since the Board holds the senior administrative staff responsible for the quality of the programs offered and the services rendered, the authority for interviewing and recommending the appointment of personnel rests with the Director of Education or those to whom such authority is delegated in accordance with the following regulations.

This policy is aligned with and supports the principles and expectations of the Board's Human Rights policy (Policy 51) and the Equity and Inclusive Education policy (Policy 54). At all times, this policy should be interpreted to be consistent with the Board's policies and the *Human Rights Code*.

### Administrative Regulations

#### 1. Appointment of Senior Supervisory Staff

1.1 Appointments to senior supervisory staff positions shall be preceded by interviews arranged at the convenience of a committee designated by the Board to carry out such interviews. This committee will include four trustees, the Director of Education, the Associate Director, Instructional & Equity Support Services, the Associate Director, School Support Services, the Associate Director, Operational Support Services, and the Chair of the Peel Association of Administrative Officials (PAAO) or designate, and such additional staff as the committee may direct. Following the interview, the Director will submit recommendations on any appointment to the Board. Notwithstanding any recommendations of the Interviewing Committee, the Director may make recommendations to the Board.

1.2 The following factors shall be considered in assessing candidates for appointment:

- a) Academic qualifications.
- b) Length of successful, professional experience in related field within and/or outside the Region.
- c) Breadth of experience – a broad background of experience in related fields, and in both elementary and secondary schools for academic personnel.
- d) Demonstrated capability of the candidate to assume greater responsibility.
- e) Personal and professional qualities.

## Policy 3 pg. 2

- 1.3 When the Board appoints a committee to search for candidates for senior administrative positions, interviews of the top three candidates must be conducted by the search or interview committee.
- 1.4 For purposes of this policy, senior supervisory staff will include:
  - Associate Directors
  - Superintendents
  - Controllers
  - Director of Communications and Community Relations Support Services Chief Information Officer
- 1.5 Notwithstanding the above, the Board reserves the right to appoint persons to temporary positions within the organization at the senior supervisory staff level without referring to interviews.
- 1.6 For lateral moves within the organization at the senior supervisory staff level, interested (internal) applicants will participate in a process where a suitable candidate will be selected.

### 2. Appointment of a Director

The identification and selection of a new Director of Education will involve establishment of a committee of trustees to search and screen candidates for consideration of the Board.

### 3. Appointment of Principals and Vice-Principals

- 3.1 Advertising of vacancies to be in accordance with the Board's Promotion Process, by the Superintendent of Leadership Development & School Support Services.
- 3.2 Applications shall be reviewed by the Superintendent of Leadership Development & School Support Services.
- 3.3 Final interviews shall be arranged at the time suitable to the panel of interviewers.
- 3.4 The interview shall consist of the following Board personnel:
  - a) A minimum of one Trustee as named by the Board. Such Trustee, when named, shall serve for at least one year. The Board may name an alternate.
  - b) Senior Administrative staff designated by the Superintendent of Leadership Development & School Support Services.
  - c) Chair (or designate) of the appropriate Principals' or Vice-Principals' Associations.
- 3.5 A quorum shall consist of four members.

### **Policy 3 pg. 3**

- 3.6 The Committee shall make its recommendations to the Superintendent of Leadership Development & School Support Services or designate.

#### **4. Assignment of Principals**

##### **4.1 New Schools**

4.1.1 Principals will normally be assigned to new schools, as follows:

- a) for secondary schools, on the first day following the winter break prior to the September in which the school is to open.
- b) for elementary schools, on the Monday following the March break prior to the September in which the school is to open.

4.1.2 One Vice-Principal will normally be assigned to new secondary schools at the beginning of Semester 2 of the year prior to the September in which the schools are to open.

4.1.3 As required a second Vice-Principal will be assigned to new secondary schools for the September opening of the school.

##### **4.2 Established Schools**

4.2.1 Principals and Vice-Principals will be appointed or assigned to established schools as needs arise.

#### **5. Other Appointments**

The Director or those to whom responsibility has been delegated shall have authority to arrange interviews and make appointments to approved positions below the levels specified in this policy.

#### **6. Travelling and Moving Allowances: Relocation of Senior Supervisory Staff**

##### **6.1 Travelling Allowance**

Persons travelling in excess of 240 kilometers for the purpose of being interviewed by the Peel District School Board for senior administrative positions (as listed in Item 1.4) will be reimbursed for all real and reasonable expenses. Mileage and hotel accommodation shall not exceed the Board's allowance for travel as per Policy 40.

##### **6.2 Moving Allowance**

Persons hired for senior administrative positions may be paid a relocation allowance at the discretion of the Director of Education. Such allowance may be paid provided that the candidate is moving his/her place of residence to Peel from a distance of more than 80 kilometers.

**Policy 3 pg. 4**

Approved June 24, 1969  
Revised December 1974  
Revised January 8, 1975

Revised March 1976  
Revised December 1976  
Revised July 1985  
Revised June 1986  
Revised September 8, 1987  
Revised April 9, 1991  
Revised April 27, 1993  
Revised October 8, 1996  
Revised January 27, 1998  
Reviewed January 2000  
Revised December 11, 2001  
Reviewed September 2002  
Revised February 25, 2003  
Reviewed December 13, 2005  
Revised February 25, 2014  
Revised June 9, 2015  
Revised, June 19, 2019

Governance and Policy Committee Meeting, April 12, 2023

# Naming and Renaming of Schools, Special Function Areas, and Facilities Policy, Update #4

**Strategic Alignment:**  
Ministry Directive 18

**Report Type:**  
Recommendation

<i>Prepared by:</i>	Donna Ford, Superintendent of Education, Brampton Centennial SS/Turner Fenton Family of Schools SS Jeff Blackwell, Associate Director, School Improvement & Equity (Acting)
<i>Submitted by:</i>	Rashmi Swarup, Director of Education



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## Overview

### **Recommendation:**

That the Naming and Renaming of Schools, Special Function Areas, and Facilities Policy, attached as Appendix A, be approved;

And further, that the Naming and Renaming of Schools, Special Function Areas, and Facilities Procedure, attached as Appendix B, be received for information.

### **Highlights:**

- In August 2021, the Board approved that the Naming of Schools Working group be struck to conduct an equity review of Policy 27 - Naming of Schools and make recommendations regarding revisions to the Policy that supports the expectations and requirements under Ministry Directive 18;
- The revised Policy 27, now entitled “Naming of Schools, Special Function Areas and Facilities Policy” was first presented at the September 14, 2022 Governance and Policy Committee meeting;
- Based on the feedback from the September Governance and Policy Committee meeting, the Policy was revised and presented at the January 18, 2023 Governance and Policy Committee meeting;
- The attached draft reflects the feedback from the Governance and Policy Committee meeting.

### **Background:**

At the January 18, 2023, Governance and Policy Committee meeting, the revised Policy 27 - Naming of School (now entitled “Naming and Renaming of Schools, Special Function Areas, and Facilities Policy”) was presented to the Committee. Feedback from the Trustees included:

- Prohibiting the use of individual’s names in the naming or renaming process for schools, special function areas, and facilities in the future;
- Specifying the process prior to initiation of a naming or renaming of the school, facility, or special function area by the Director of Education;
- Defining a special function area;
- Indicating the potential composition of the Naming Committee.

## Evidence

### **Findings/Key Considerations:**

The Naming and Renaming of Schools, Special Function Areas, and Facilities Policy has been revised based on the Committee’s feedback to include the following:

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### Definition of a special function area:

A designated area dedicated to operating an alternative or specialized program of learning (e.g., regional learning choices program space, technology/STEAM program area, learning commons/library) that is part of the school.

### Assessment Process of Name Change Requests

1. PDSB students, staff, parents/caregivers, trustees and members of the Peel community can request to change a name, in writing, through the Request to Change a Name Form directed to the attention of the Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or their designate.
2. The Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or their designate alongside the appropriate site lead and Superintendent of Education, where applicable, will assess the submission. Requests for name changes that are to be considered will be brought to the attention of the Director of Education.

The revised draft also prohibits the use of an individual's name, rather it specifies that proposed names for schools, facilities, and special function areas can honour the recognition of something of historical significance with positive contribution to the local community, Peel, Canada or internationally. Further, the revised policy specifies the potential composition of the Naming Committee when naming or renaming a school, facility or special function area.

## Impact Analysis

### **Equity & Human Rights Review:**

The work of the School Naming Working group (the "Working group") in support of the review and revision of Policy 27 - Naming of Schools illustrates the principles of anti-racism, anti-oppression, human rights, and anti-colonialism. These same principles are embedded within the two revised processes for the naming and renaming of schools, facilities, and special function areas as outlined in the Policy.

The revised Policy contributes to the organizational actions to assess and reassess instances of exclusion and/or the manifestations of systemic discrimination that can arise through a significant process such as naming. Naming is a meaningful and symbolic act that must demonstrate the anti-racist, anti-oppressive, anti-colonial principles, and human rights commitments of the Peel District School Board.

### **Board or Ministry Policy Alignment:**

The Policy supports the requirements under Ministry Directive 18. The Policy is aligned with and supports the principles outlined in the PDSB's Human Rights Policy, Anti-Racism Policy and the Equitable and Inclusive Education Policy.

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**Community Impact:**

It is anticipated that this review of Policy 27 will reinforce stakeholder engagement with the system transformation of the Peel District School Board, heighten understanding of the various applications of anti-racist, anti-oppressive, anti-colonial principles, and Human Rights commitments through ongoing assessment processes.

## Next Steps

**Action Required:**

- Recommendation for approval at the next Board meeting
- Staff development and Director's Council approval of the Naming and Renaming of Schools, Special Function Areas and Facilities procedure.

**Communications:**

Once approved by the Board of Trustees, the Policy will be uploaded to both the intranet and the Peel external website. Knowledge of and capacity building in relation to the framework will occur through existing mechanisms.

**Success Measures:**

Naming or renaming of schools, special functions areas and facilities that are reflective of the principles outlined within the Policy.

## Appendices

Appendix A – Naming and Renaming of Schools, Special Function Areas, and Facilities Policy

Appendix B – Naming and Renaming of Schools, Special Function Areas, and Facilities Procedure

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# PEEL DISTRICT SCHOOL BOARD POLICY

## Naming and Renaming of Schools, Special Function Areas, and Facilities

**POLICY ID:** TBD

**FUNCTIONAL CATEGORY:** TBD

**RESPONSIBILITY:** Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement

**APPROVAL:** Board of Trustees

**APPROVAL DATE:** TBD

**EFFECTIVE DATE:** TBD

**PROJECTED REVIEW DATE:** 2027-2028 school year

**REVIEW SCHEDULE:** 5 years

### 1. Preamble

In March 2020, the Ministry of Education issued 27 Directives for the Peel District School Board (the “PDSB”). The Directives followed a Review of the PDSB, which raised concerns of systemic discrimination, specifically anti-Black racism, human rights practices, and governance issues.

The review of the Naming and Renaming of Schools, Special Function Areas and Facilities Policy and its Procedures is one of the responses to the Ministry directive that all PDSB policies, practices, and structures are “audited.” That is, examined and/or developed and implemented using anti-racist, anti-oppressive and anti-colonial principles to secure the achievement and wellbeing of Black, Indigenous, and racialized students in the Peel District School Board.

The Board has a duty under the Education Act, R.S.O. 1990 to promote a positive school climate that is inclusive and accepting of all students.

### 2. Purpose

The purpose of this policy is to:

- 2.1 provide a framework for the naming or renaming of PDSB schools, facilities and special function areas of schools.
- 2.2 provide transparency in the naming and renaming of PDSB schools, facilities and special function areas of schools.

### 3. Application and Scope

This policy applies to the naming and renaming of PDSB schools, facilities, and special function areas of schools.

### 4. Definitions

- 4.1 **Facility:** A building that is PDSB property but is not a school.
- 4.2 **Special function area:** A designated area dedicated to operating an alternative or specialized program of learning (e.g., regional learning choices program space, technology/STEAM program area, learning commons/library) that is part of the school.
- 4.3 **Local school community:** The students, families, and school staff that attend and/or work at the school; alumni and school trustees.
- 4.4 **PDSB Community:** Represents students, parents/guardians, trustees, full-time, part-time, temporary, probationary, casual and contract employees, permit holders, vendors, service providers, contractors, volunteers, visitors, bargaining agents and associations, and all other persons invited to or who work on Board property.

### 5. Policy: Principles and Values

- 5.1 The PDSB recognizes that the names of schools, facilities, and special function areas have the potential to reinforce racist and colonial beliefs maintained in Ontario public schools. These names are symbolic of who and what the district values and therefore must align with the PDSB stated commitments to the principles of equity, inclusivity, anti-racism, anti-oppression and anti-colonialism.

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As such, it is through the input of the PDSB community (e.g., students, their families, community members, trustees, staff) that the PDSB is aware of the extent to which these principles and values, as represented by the name of a school, facility or special function area, are upheld.

5.2 The Naming or renaming of a school, facility or special function area can arise from the following circumstances, including but not limited to:

- a) New construction.
- b) The consolidation of schools.
- c) A significant change in the focus of a school or part of a school housing alternative or specialized programs to reflect the following scenarios:
  - (i) An addition to the existing school structure or a facility upgrade of a school, for example, the renaming of a wing.
  - (ii) The rebranding or reimagining of a school.
  - (iii) Replacement (i.e., replacing an elementary school with a secondary school).
- d) An equity audit of existing names that identifies a school, a special function area of a school or a facility whose name does not align with PDSB's commitment to anti-colonialism, anti-racism, anti-oppression, human rights, equity, diversity and inclusion.
- e) A renaming request submitted by students, staff, parents, a local community member or a Trustee.

5.3 PDSB students, staff, parents/caregivers, trustees and members of the Peel community can request to change a name, in writing, through the Request to Change a Name Form directed to the attention of the Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or their designate.

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- 5.4 The Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or their designate alongside the appropriate site lead and Superintendent of Education, where applicable, will assess the submission within a reasonable time, not exceeding six months. Requests for name changes that are to be considered will be brought to the attention of the Director of Education.
- 5.5 The Director of Education has the authority to start the process to name or rename a school, facility or special function area. The PDSB Trustees approve the proposed name or rename of a school, facility or special function area by a majority vote.
- 5.6 The Board is committed to, and directs, meaningful community engagement with the local school community, including students, when naming or renaming a PDSB school, a special function area or a facility. Community engagement must be consistent with any available PDSB community engagement policy or procedure and must actively strive to include and engage the voices and perspectives of current and historically disadvantaged persons and groups within the local school community through various methods.
- 5.7 Proposed names shall:
- a) Align with PDSB's commitment to anti-colonialism, anti-racism, anti-oppression and human rights, and consider equity, diversity and inclusion.
  - b) Consider the diversity of PDSB Community Members, including but not limited to diversity of race, gender, creed and abilities, for example, and strive to name and rename to reflect that diversity.
  - c) Be distinct from other PDSB names.
- 5.8 Proposed names may:
- a) Be the traditional territory or Indigenous name of the area.

- b) Be the current name of the local community.
- c) Be the name of the street on which the school, special area of the school or the facility faces.
- d) Honour the recognition of something of historical significance with positive contribution to the local community, Peel, Canada or internationally.
- e) Describe the program at the school, the special area of the school or the facility.

5.9 Proposed schools, special function areas, and facilities names shall not include:

- a) Names of identifiable individuals, including:
  - (i) current PDSB employees or Board members
  - (ii) Persons who are known to have championed or orchestrated the mechanisms (legislation, policies and practices of assimilation) of colonialism in Canada.
  - (iii) Persons who are known to have engaged in the trans-Atlantic slave trade or known to have enslaved Africans, or to have championed or orchestrated the segregation of schools in Ontario based on perceived race.
- b) Names of corporations.

## **6. Roles and Responsibilities**

### **Board of Trustees:**

6.1 Approve the proposed name or rename of a school, facility, or special function area by a majority vote.

### **Director of Education:**

6.2 Authorize the initiative to name or rename a school, facility or special function area.



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- 6.3 Bring forward final recommendations approved by Director's Council for the naming or renaming of a school, facility or special function area to the Board of Trustees

**Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or their designate:**

- 6.4 Accountable for the implementation of this Policy across the Board and PDSB schools.
- 6.5 Ensure that the Naming Committee engage in community engagement consistent with any available PDSB community engagement policy or procedure when naming or renaming a school, facility, or special function area.
- 6.6 Responsible for proposing housekeeping amendments to this Policy to the Governance Officer.
- 6.7 Responsible for the post-implementation review of this Policy.
- 6.8 Responsible for ensuing related Procedures are developed.
- 6.9 Provide interpretation of this Policy and related Procedures.
- 6.10 Support understanding and implementation of this Policy and related procedures across the Board and PDSB schools.
- 6.11 Strike a Naming Committee once the Director of Education has approved the renaming a PDSB school or a facility. The following individuals shall be offered the opportunity to sit on the Naming Committee:
- a) The Superintendent of Equity, Indigenous Education, School Engagement and Community Relations or their designate
  - b) The area trustee(s)
  - c) The Family of Schools Superintendent
  - d) The school principal or designate
  - e) The Executive Lead, Public Engagement & Communications, or their designate

- f) A Facilities department manager or their designate
  - g) Regional representatives from the town or city in which the facility is located
  - h) A Staff member of the school
  - i) A School council representative
  - j) A Student government representative
  - k) A PDSB student advisory committee representative
  - l) A member/representative of the Indigenous Education Circle, the Black, African, African Caribbean Alliance, Parent Involvement Committee and/or the Special Education Advisory Committee
- 6.12 Bring forward final recommendations for the naming or renaming of a school or facility from the Naming Committee to Director's Council for approval.
- 6.13 Bring forward final recommendations to the Physical Planning, Finance and Building Committee for recommendation for approval by the Board of Trustees.
- 6.14 Maintain a list of names that have previously been reviewed by a Naming Committee for future reference.
- 6.15 Ensure the implementation of the Policy and Procedures are supported by all relevant officers, including Facility Services, Learning Technology Support Services and Communications.

#### **Family of Schools Superintendent**

- 6.16 Strike a Naming Committee with the authorization of the Director of Education for naming or renaming of a special function area of a school. Considering whether it is the naming or renaming a special function area of a school, the following individuals shall be offered the opportunity to sit on the Naming Committee, as applicable:
- a) The area trustee(s)

- b) The school principal or designate
  - c) The Executive Lead, Public Engagement & Communications, or their designate
  - d) A Facilities department manager or their designate
  - e) A Staff member representative
  - f) A School council representative
  - g) A Student government representative
  - h) A PDSB student advisory committee representative
  - i) A member/representative of the Indigenous Education Circle, the Black, African, African Caribbean Alliance, Parent Involvement Committee and/or the Special Education Advisory Committee
- 6.17 Ensure the implementation of the Policy and Procedures are supported by all relevant officers, including Facility Services, Learning Technology Support Services and Communications.
- 6.18 Ensure that the Naming Committee engage in community engagement consistent with any available PDSB community engagement policy or procedure when naming or renaming a special function area of a school.
- 6.19 Bring forward final recommendations on the naming or renaming of a special function area to the Physical Planning, Finance and Building Committee for recommendation for approval by the Board of Trustees.

### **Naming Committee**

- 6.20 Ad hoc committee that provides feedback, advice, and recommendations for the communication plans and community engagement plans as part of the naming and renaming process, which are to be consistent with any available PDSB community engagement policy or procedure.
- 6.21 Prepare a timeline for the naming or renaming process.

- 6.22 Make recommendations to the PDSB Director’s Council and the Physical Planning, Finance, and Building Committee for the naming or renaming of a PDSB school, facility or special function area.

**Governance Officer**

- 6.23 Ensure the most recent version of this Policy and related Procedures are found on the PDSB’s website.

**7. Reference Documents**

Naming and Renaming of Schools, Special Function Areas, and Facilities Procedure

Anti-Racism Policy

Human Rights Policy

Equitable and Inclusive Education Policy

**8. Revision History**

Review Date	Approval Date	Description
	June 9, 1971	
February 1973		Revised.
April 9, 1991		Revised.
January 1, 1998		To reflect the change in board name
January 2000		Reviewed.
February 25, 2003		Revised.
December 13, 2005		Revised.
February 25, 2014		Reviewed.
November 13, 2018		Revised to replace former Policy 27

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**PEEL DISTRICT SCHOOL BOARD POLICY**  
**Naming and Renaming of Schools, Special Function Areas, and  
Facilities Procedure**

**PROCEDURE ID:** TBD

**PARENT POLICY:** Naming and Renaming of Schools, Special Function Areas, and  
Facilities

**RESPONSIBILITY:** Associate Director of School Improvement and Equity, Curriculum  
and Instruction, and Student and Community Engagement

**APPROVAL:** Director's Council

**APPROVAL DATE:** TBD

**EFFECTIVE DATE:** TBD

**PROJECTED REVIEW DATE:** 2027-2028 school year

**REVIEW SCHEDULE:** 5 years

## **1. Purpose**

1.1 This Procedure is made pursuant to Policy 27, Naming and Renaming of  
Schools, Special Function Areas, and Facilities.

## **2. Application and Scope:**

This procedure applies to the naming and renaming of Peel District School Board  
(PDSB) schools, facilities, and special function areas.

## **3. Definitions**

3.1 **Facility:** A building that is PDSB property but is not a school.

3.2 **Special function area:** A designated area dedicated to operating an alternative  
or specialized program of learning that is part of the school.

3.3 **Local school community:** The students, families, and school staff that attend  
and/or work at the school; alumni and school trustees.

- 3.4 **PDSB Community:** Represents students, parents/guardians, trustees, full-time, part-time, temporary, probationary, casual and contract employees, permit holders, vendors, service providers, contractors, volunteers, visitors, bargaining agents and associations, and all other persons invited to or who work on Board property.

## 4. Procedure

### CIRCUMSTANCES

- 4.1 The naming and renaming of a PDSB school, a special function area of a school or a facility, may arise from:
- a) New construction.
  - b) The consolidation of schools.
  - c) A significant change in the focus of a school or part of a school housing alternative or specialized programs to reflect the following scenarios:
    - (i) An addition to the existing school structure or a facility upgrade of a school, for example, the renaming of a wing.
    - (ii) The rebranding or reimagining of a school.
    - (iii) Replacement (i.e., replacing an elementary school with a secondary school).
  - d) An equity audit of existing names that identifies a school, a special function area of a school or a facility whose name does not align with PDSB's commitment to anti-colonialism, anti-racism, anti-oppression, human rights, equity, diversity and inclusion.
  - e) A renaming request submitted by students, staff, parents, a local community member or a Trustee.
- 4.2 A Request to Change a Name Form will be available on the intranet and PDSB website. The Form will ask for the student, staff person, parent, local community member, or Board member to explain why they are requesting the name change

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to the school, special function area or facility. This form will be submitted to the attention of the Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or their designate.

- 4.3 The Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or their designate alongside the appropriate site lead and Superintendent of Education, where applicable, will assess the submission. Requests for name changes that are to be considered will be brought to the attention of the Director of Education.

#### **INITIATION OF THE NAMING OR RENAMING PROCESS**

- 4.4 The Director of Education has the authority to start the process to name or rename a school, facility or special function area.

#### **NAMING COMMITTEE COMPOSITION AND RESPONSIBILITIES**

- 4.5 **Naming or Renaming of a School or Facility:** With the authorization of the Director of Education, The Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or their designate, will establish a Naming Committee. The Naming Committee shall reflect the diversity of the school population and the PDSB community.

Considering whether it is the naming or renaming of a school or a facility, the Naming Committee may include:

- a) The Superintendent of Equity, Indigenous Education, School Engagement and Community Relations or their designate
- b) The area trustee(s)
- c) The Family of Schools Superintendent
- d) The school principal or designate
- e) The Executive Lead, Public Engagement & Communications, or their designate
- f) A Facilities department manager or their designate

- g) Regional representatives from the town or city in which the facility is located
- h) A Staff member of the school
- i) A School council representative
- j) A Student government representative
- k) A PDSB student advisory committee representative
- l) A member/representative of the Indigenous Education Circle, the Black, African, African Caribbean Alliance, Parent Involvement Committee and/or the Special Education Advisory Committee

4.6 **Naming or Renaming of a Special Function Area:** With the authorization of the Director of Education, a Naming Committee will be struck by the Family of Schools Superintendent or their designate. Considering whether it is the naming or renaming a special function area of a school, the Naming Committee may include:

- a) The area trustee(s)
- b) The school principal or designate
- c) The Executive Lead, Public Engagement & Communications, or their designate
- d) A Facilities department manager or their designate
- e) A Staff member representative
- f) A School council representative
- g) A Student government representative
- h) A PDSB student advisory committee representative
- i) A member/representative of the Indigenous Education Circle, the Black, African, African Caribbean Alliance, Parent Involvement Committee and/or the Special Education Advisory Committee



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- 4.7 The Naming Committee members shall declare no conflict of interest or be unable to serve on the committee.
- 4.8 The Naming Committee will consider and implement meaningful ways to engage with, and invite submissions from, the local community, including students. The Naming Committee will ensure that the consultation process reflects the diversity of the school/facility community and PDSB community and must actively strive to include and engage the voices and perspectives of current and historically disadvantaged persons and groups within the local community. Community Engagement is to be consistent with any available PDSB community engagement policy or procedure. This can be done in multiple ways, including, but not limited to:
- a) Carrying out a process to seek feedback on what is relevant and resonates with the local community, including students.
  - b) Carrying out a process seeking potential names of the process.
- 4.9 The Naming Committee, in consultation with Legal Counsel, will ensure that the PDSB has the legal authority to use a name that they may recommend, and for ensuring that appropriate approvals are secured when schools, special function areas or a facility is named after an individual.
- 4.10 The Naming Committee will determine a recommended list of three names in order of preference and consistent with the principles and values expressed in the Naming and Renaming of Schools, Special Function Areas and Facilities Policy.

#### **APPROVAL PROCESS**

- 4.11 The Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or the Family of Schools Superintendent or their designates, as applicable, will prepare a report for the Director's Council, and the Board of Trustees which would include:
- a) The rationale for the recommended names.

- b) The community engagement plan.
  - c) An anonymized summary of the participants.
  - d) A thematic summary and description of the findings.
- 4.12 In the renaming of a facility or school, the report will also provide information on timelines for implementation and financial implications.
- 4.13 The Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or the Family of Schools Superintendent or their designates, as applicable, will bring forward the report, including the short-list of names to PDSB's Director's Council for approval.
- 4.14 The Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or the Family of Schools Superintendent or their designates, as applicable, will bring forward the report to the Physical Planning, Finance and Building Committee. The Committee will discuss the proposed names and may:
- a) Vote on the recommendation for the preferred name
  - b) Recommend the short-list of names for approval by the Board of Trustees
  - c) Refer the report back to staff
- 4.15 The Board of Trustees will approve the final name by a majority vote. If a majority is not reached for any of the recommended names, the motion is rejected, and the Naming Committee will need to work on a new proposal.
- 4.16 The PDSB will announce the chosen name on PDSB's website, the school's website (if applicable) and an event may be held to signify the occasion.

## **5. Roles and Responsibilities**

### **Director of Education:**

- 5.1 Authorize the initiative to name or rename a school, facility or special function area.

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- 5.2 Bring forward final recommendations approved by Director's Council for the naming or renaming of a school, facility or special function area to the Board of Trustees

**Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement or their designate:**

- 5.3 Accountable for the implementation of this procedure across the Board and PDSB schools.
- 5.4 Ensure that the Naming Committee engage in community engagement consistent with any available PDSB community engagement policy or procedure when naming or renaming a school, facility, or special function area.
- 5.5 Responsible for proposing housekeeping amendments to this procedure to the Governance Officer.
- 5.6 Responsible for the post-implementation review of this procedure.
- 5.7 Responsible for ensuing related procedures are developed.
- 5.8 Provide interpretation of this procedure and related Procedures.
- 5.9 Support understanding and implementation of this procedure and related procedures across the Board and PDSB schools.
- 5.10 Strike a Naming Committee once the Director of Education has approved the renaming a PDSB school or a facility.
- 5.11 Bring forward final recommendations for the naming or renaming of a school or facility from the Naming Committee to Director's Council for approval.
- 5.12 Bring forward final recommendations to the Physical Planning, Finance and Building Committee for recommendation for approval by the Board of Trustees.
- 5.13 Maintain a list of names that have previously been reviewed by a Naming Committee for future reference.

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- 5.14 Ensure that the implementation of this procedure and related procedures are supported by all relevant officers, including Facility Services, Learning Technology Support Services and Communications.

**Family of Schools Superintendent**

- 5.15 Strike a Naming Committee with the authorization of the Director of Education for naming or renaming of a special function area of a school.
- 5.16 Ensure that the implementation of this procedure and related procedures are supported by all relevant officers, including Facility Services, Learning Technology Support Services and Communications.
- 5.17 Ensure that the Naming Committee engage in community engagement consistent with any available PDSB community engagement policy or procedure when naming or renaming a special function area of a school.
- 5.18 Bring forward final recommendations on the naming or renaming of a special function area to the Physical Planning, Finance and Building Committee for recommendation for approval by the Board of Trustees.

**Naming Committee**

- 5.19 Ad hoc committee that provides feedback, advice, and recommendations for the communication plans and community engagement plans as part of the naming and renaming process, which are to be consistent with any available PDSB community engagement policy or procedure.
- 5.20 Prepare a timeline for the naming or renaming process.
- 5.21 Make recommendations to the PDSB Director's Council and the Physical Planning, Finance, and Building Committee for the naming or renaming of a PDSB school, facility or special function area.

**Governance Officer**

- 5.22 Ensure the most recent version of this procedure and related procedures are found on the PDSB's website.

**6. Appendices**

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Appendix A – Request to Change Name Form

**7. Reference Documents**

Naming and Renaming of Schools, Special Function Areas, and Facilities Policy

Anti-Racism Policy

Human Rights Policy

Equitable and Inclusive Education Policy

**8. Revision History**

Review Date	Approval Date	Description

## 7.3

Governance and Policy Committee Meeting, April 12, 2023

# Student Registration and Admission Policy

**Strategic Alignment:**

*Education Act*

**Report Type:**

Recommendation

<i>Prepared by:</i>	Elizabeth England, Coordinating Principal, Curricular, Instructional & Community Supports Dr. Camille Logan, Associate Director of School Improvement and Equity, Curriculum and Instruction, and Student and Community Engagement
<i>Submitted by:</i>	Rashmi Swarup, Director of Education

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## Overview

### Recommendation:

That the Student Registration and Admission Policy, attached as Appendix A, be approved.

### Highlights:

- The PDSB's primary responsibility to provide education to students who are "resident pupils" of the Board, as defined and set out in the *Education Act*;
- The right of resident pupils to attend a school which is designated to serve their residential address;
- The ability of non-resident pupils to attend PDSB with or without payment of a tuition fee (as applicable);
- Compulsory attendance under s. 21 of the *Education Act* for students who have attained the age of six (6) years until they attain the age of 18 years;
- Non-compulsory but encouraged attendance of students in junior and senior kindergarten to provide students with the benefit of social/emotional opportunities and a strong foundation for learning;
- Student registration processes for families new to Canada through the PDSB We Welcome the World Centre;
- The provision of adult education through adult and continuing education in accordance with the *Education Act*;
- Excusal from attendance at a PDSB school where a student is receiving satisfactory instruction at home or elsewhere under s. 21(a) of the *Education Act*, and the PDSB's related responsibilities as set out in Ministry policy and program memoranda.

### Background:

The purpose of education is to provide students with the opportunity to realize their potential and develop into highly skilled, knowledgeable, and caring citizens who contribute to their society (*Education Act*, s. 0.1). The Peel District School Board (PDSB) recognizes that its primary responsibility under the *Education Act* is to provide education to resident pupils of the board and welcomes all eligible students to apply and register at the PDSB.

The purpose of the Student Registration and Admission Policy is to facilitate the registration, admission, placement, and withdrawal of eligible students to the Peel District School Board through associated operating procedures in accordance with the requirements of the *Education Act* and its associated policy and program memoranda and guidance documents. This Policy applies to all students and/or parents/guardians applying for and/or accepted for enrolment and admission to the PDSB and all PDSB staff involved in the processing of applications, registration, and admission of students.

The Student Registration and Admission Policy will be the parent policy to the Student Registration and Admission Requirements Procedure, the revised Grade Placement Procedures for elementary and secondary, and other proposed operating procedures including but not limited to:

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- Adult and Continuing Education Registration Requirements
  - Non-Resident Pupil Requirements
  - Families New to Peel.

The Student Registration and Admission Requirements Procedure, which is attached for information as Appendix B, provides direction to staff to outline and support the student registration and admission requirements process as set out in the *Education Act* and relevant Ministry guidance documents.

## Evidence

### **Findings/Key Considerations:**

The Student Registration and Admission Policy was drafted in compliance with the *Education Act* and all relevant policy/program memoranda and guidance documents. The Student Registration and Admission Policy is informed by an environmental scan of similar school board policies. The policy also received feedback from the central superintendents.

The Student Registration and Admission Policy will be operationalized through procedures in a manner consistent with the *Education Act* and all applicable Ministry policy and program memoranda, requirements and guidance documents and will address items including but not limited to compulsory student attendance; eligibility, registration and admission of students, including resident and non-resident pupils and applicable tuition fees; grade placement; flexible school boundaries; and withdrawal from enrolment; home schooling; virtual schooling; and adult and continuing education.

## Impact Analysis

### **Equity & Human Rights Review:**

The Student Registration and Admission Policy will prevent systemic inequities and uphold human rights by providing a clear, transparent process for the registration, admission, placement, and withdrawal of students to the PDSB through associated operating procedures in adherence with the *Education Act*. Decisions by PDSB staff facilitating this Policy are to be made based on these requirements as set out in the Student Registration and Admission Policy and not in a discretionary manner or a manner informed by biases.

The Student Registration and Admission Policy will create clarity on an inclusive and welcoming process for families new to Canada to support students' registration, admission and placement to PDSB and their future success at PDSB.

### **Board or Ministry Policy Alignment:**

This policy aligns with:

- *Education Act*, R.S.O. 1990, c.E.2;



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- PPM 136 – *Clarification on section 49.1 of the Education Act: education of persons unlawfully in Canada*;
  - *Ministry of Education: Ontario Schools, Kindergarten to Grade 12 – Policy and Program Requirements*, as amended;
  - Ministry Memorandum 2018:SB08 – Clarification of Policies and Supporting Documentation to Confirm Pupil Residency and Eligibility Status;
  - Ministry of Education Enrolment Register Instructions for Elementary and Secondary Schools, as amended each year.

**Resource/Financial Implications:**

Time will be allocated regularly for ongoing training to be provided to staff facilitating the Student Registration and Admission Policy and its associated procedures relating to student registration, admission, placement and withdrawal.

**Legal implications:**

The Student Registration and Admission Policy supports the Board’s legal responsibilities with respect to compliance with the legislative requirements of the *Education Act* and regulations, policy and program memoranda and relevant guidance documents made under it.

**Risk Assessment:**

The risks of not establishing the Student Registration and Admission Policy and associated operating procedures under this Policy are non-compliance with the Board’s legal responsibilities and inconsistent decisions and inappropriate application of discretion with respect to the registration, admission, placement and withdrawal of students.

**Community Impact:**

The Student Registration and Admission Policy will be publicly available and will support transparency and accessibility to the community regarding the requirements under the *Education Act* and PDSB's processes with respect to student registration and admission.

## Next Steps

**Action Required:**

Approval by the Board of Trustees of the Student Registration and Admission Policy, attached as Appendix A.

The approval of operating procedures through Director’s Council including:

- Student Registration and Admission Requirements Procedure
- Grade Placement Procedures for elementary and secondary

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Drafting of other associated operating procedures and the review of revision of guidelines, forms and processes tied to student registration, admission, placement, and withdrawal.

**Communications:**

Once approved, the policy will be uploaded to the Peel websites and disseminated through existing mechanisms to staff, schools, and families.

**Success Measures:**

Clear and consistently applied application of the Student Registration and Admission Policy in compliance with the *Education Act*.

Clear understanding from the community of the requirements and process with respect to student registration and admission.

## Appendices

Appendix A – Student Registration and Admission Policy

Appendix B – Student Registration and Admission Requirements Procedure

# PEEL DISTRICT SCHOOL BOARD POLICY

## Student Registration and Admission

**POLICY ID:** TBD

**FUNCTIONAL CATEGORY:** TBD

**RESPONSIBILITY:** Curriculum, Instruction and Assessment

**APPROVAL:** Board of Trustees

**APPROVAL DATE:** TBD

**EFFECTIVE DATE:** TBD

**PROJECTED REVIEW DATE:** 2027 – 2028 school year

**REVIEW SCHEDULE:** 5 years

### 1. PURPOSE

The Peel District School Board (“PDSB” or the “Board”) recognizes that a strong public education system is the foundation of a prosperous, caring, and civil society and welcomes all eligible students to apply and register at the PDSB. The purpose of education is to provide students with the opportunity to realize their potential and develop into highly skilled, knowledgeable and caring citizens who contribute to their society (*Education Act*, s. 0.1).

The purpose of this Student Registration and Admission Policy (this “Policy”) is to facilitate the registration, admission, placement, and withdrawal of eligible students to the PDSB in accordance with the requirements of the *Education Act* and its associated policy and program memoranda and guidance documents.

### 2. SCOPE

This Policy applies to all students and/or parents/guardians applying and/or accepted for enrolment and admission to the PDSB and all PDSB staff involved in the processing of applications, registration, and admission of students.

This Policy will, at all times, be interpreted in a manner consistent with Board policies, the *Education Act* and its regulations, relevant Ministry PPMs and guidance documents, the *Ontario Human Rights Code* and other applicable legislation. This Policy is aligned

with and supports the principles and expectations of PDSB Policy 51, Human Rights, Policy 54, Equity and Inclusive Education and the Anti-Racism Policy.

### 3. DEFINITIONS

- 3.1 **Adult student:** In this Procedure and for the purpose of attending adult and continuing education, adult student is a student as set out in s. 49.2 (Adult persons) of the Education Act, generally a student who is 21 years or older by December 31 of the current calendar year.
- 3.2 **Education Act:** Reference to the Ontario *Education Act* incorporates its regulations and all applicable Ministry of Education policy and program memoranda and guidance documents.
- 3.3 **Parent/Guardian:** Refers to the person having lawful custody of a student, which can include a Parent(s) or guardian(s). Reference to parent(s)/guardian(s) does not apply to students who are 18 years or older, or where a student is 16 or 17 years old and has withdrawn from parental control.
- 3.4 **Resident Pupil:** A student is entitled to attend a school without fee in a school board's jurisdiction in which they are qualified to be a "resident pupil" in accordance with the *Education Act*. A student becomes a resident pupil if they enroll in a school in their school board's jurisdiction, or in a school operated by another board, that pays fees on behalf of the student.

To qualify as a resident pupil for the purposes of elementary public schools, the student must reside in the school board's jurisdiction along with their parent/guardian. To qualify as a resident pupil for the purposes of secondary school and to attend school without a fee, the student must reside in the school board's jurisdiction along with their parent/guardian (if under 18, or 16 and 17 and have not withdrawn from parental control).

- 3.5 **Non-Resident Pupil:** Students who would not qualify as a "resident pupil", and includes but is not limited to students from outside Peel Region within Ontario; students with parents/guardians who reside outside Peel Region within Ontario; students from outside Ontario; students with parents/guardians who reside

outside Ontario; students living on a First Nation, Metis, or Inuit Reserve, or students from outside Canada.

- 3.6 **Student or Pupil:** Pupil under the *Education Act*.
- 3.7 **Tuition Fees:** Fees required in return for educational services provided and may be requested from any student who is from another country or whose parent(s)/guardian(s) reside in another province in Canada. They are payable in advance of student attendance at a PDSB school.

## 4. POLICY

- 4.1 The PDSB recognizes its primary responsibility under the *Education Act* to provide education to students who are resident pupils of the Board. Resident pupils have the right to attend a school which is designated to serve their residential address.
- 4.2 Non-resident pupils who otherwise meet requirements as set out in the *Education Act* permitting them to attend PDSB with or without payment of a tuition fee (as applicable) may be admitted subject to space and program availability.
- 4.3 In compliance with the *Education Act*, and unless excused from attendance under s. 21 of the *Education Act*,
- a) every person who attains the age of six (6) years (“compulsory school age”) on or before the first school day in September of that calendar year shall attend school on every school day from the first school day in September in that calendar year until the person attains the age of 18 years; and
  - b) every person who attains the age of six (6) years after the first school day in September of that calendar year shall attend school on every school day from the first school day in September in the next succeeding year until the last school day in June in the year in which the person attains the age of 18 years; and
- 4.4 Attendance in both the junior kindergarten and senior kindergarten programs are not compulsory unless a child has been enrolled as a pupil in junior or senior kindergarten program in an elementary school, at which point, they are considered compulsory school age, regardless of their age. PDSB promotes full time attendance in junior and senior kindergarten programs whenever possible, as most children readily adapt to full-day learning in a caring, well-supervised kindergarten environment. Students benefit from the

social/emotional opportunities provided in this environment and are provided with a strong foundation for learning.

- 4.5 Students of families new to Canada must be referred to the PDSB We Welcome the World Centre to verify their eligibility for admission as resident pupils or non-resident pupils and status as fee-paying or non-fee-paying students in accordance with the *Education Act* and Board procedure.
- 4.6 Resident pupils have the right to attend a school which is designated to serve their residential address. Students may apply for registration at a school outside of their designated boundary in accordance with Board procedure on flexible boundaries.
- 4.7 Adult students will generally be directed to adult and continuing education in accordance with the *Education Act*.
- 4.8 A student may be excused from attendance at school if they are receiving satisfactory instruction at home or elsewhere (*Education Act*, s. 21(a)). The PDSB recognizes and is committed to the responsibilities and requirements of public school boards set out in relevant Ministry Policy and Program Memoranda (PPM) with respect to alternate forms of learning such as homeschooling and private education, including PPM 131: *Home Schooling and Ontario Schools, Kindergarten to Grade 12: Policy and Program Requirements, 2016*.

## **5. PROCEDURE**

- 5.1 This Policy will be operationalized through procedures in a manner consistent with the *Education Act* and all applicable Ministry policy and program memoranda, requirements and guidance documents and will address items including but not limited to compulsory student attendance; eligibility, registration and admission of students, including resident and non-resident pupils and applicable tuition fees; grade placement; flexible school boundaries; and withdrawal from enrolment; home schooling; virtual schooling; and adult and continuing education.

## **6. RESPONSIBILITIES**

- 6.1 Board of Trustees
  - a) Reviewing this Policy in accordance with the *Education Act* and the approved policy review cycle;

- b) Understanding, communicating, and informing the PDSB community of this Policy and associated Procedures approved under this Policy, as required.

6.2 Director of Education

- a) Implementing this Policy in accordance with the requirements of the *Education Act* and all applicable Ministry policy and program memoranda, requirements and guidance documents;
- b) Allocating sufficient staff and resources to support the Policy;
- c) Ensuring relevant information regarding this Policy and its associated Procedures are made available to the PDSB community and the public;
- d) Reference to the Director of Education includes themselves and/or an appropriate designate.
- e) Authorize operating procedures under this Policy.

**7. REFERENCES**

**Legislative**

*Education Act*, R.S.O. 1990 c.E.2

*Ministry of Education: Ontario Schools, Kindergarten to Grade 12 – Policy and Program Requirements*, as amended

*Ministry of Education: Enrolment register instructions*, as amended

**8. Revision History**

Review Date	Approval Date	Description

# PEEL DISTRICT SCHOOL BOARD PROCEDURE

## Student Registration and Admission Requirements

**PROCEDURE ID:** TBD

**PARENT POLICY:** Student Registration and Admission

**RESPONSIBILITY:** Curriculum, Instruction, and Assessment

**APPROVAL:** Director's Council

**APPROVAL DATE:** TBD

**EFFECTIVE DATE:** TBD

**PROJECTED REVIEW DATE:** 2027 – 2028 school year

**REVIEW SCHEDULE:** 5 years

### 1. Purpose

To outline and support the student registration and admission requirements process as set out in the Education Act and its associated policy and program memoranda and guidance documents.

### 2. Application and Scope:

This Student Registration and Admission Requirements Procedure (this "Procedure") applies to all students and/or parents/guardians applying and/or accepted for registration and admission to the Peel District School Board ("PDSB" or the "Board") and all PDSB staff involved in the processing of applications, registration, and admission of students, including principals and vice-principals, school office staff, and PDSB We Welcome the World Centre staff.

This Procedure will, at all times, be interpreted in a manner consistent with Board policies, the *Education Act* and its regulations, relevant Ministry PPMs and guidance documents, the *Ontario Human Rights Code* and other applicable legislation. This Procedure is aligned with and will be interpreted in a manner consistent with the Student Registration and Admission Policy and its associated Operating Procedures regarding registration, admission, placement, and attendance requirements at PDSB. This Policy is aligned with and supports the principles and expectations of PDSB Policy



51, Human Rights, Policy 54, Equity and Inclusive Education and the Anti-Racism Policy.

Where an issue arises that is not covered by or conflicts with this Procedure, it shall be resolved in a manner consistent with the *Education Act* and the content and purpose of this Procedure and its parent Policy.

### 3. Definitions

- 3.1 **Adult student:** In this Procedure and for the purpose of attending adult and continuing education, adult student is a student as set out in s. 49.2 (Adult persons) of the *Education Act*, generally a student who is 21 years or older by December 31 of the current calendar year.
- 3.2 **Education Act:** Reference to the Ontario *Education Act* incorporates its regulations and all applicable Ministry of Education policy and program memoranda and guidance documents.
- 3.3 **Parent/Guardian:** Refers to the person having lawful custody of a student, which can include a Parent(s) or guardian(s). Reference to parent(s)/guardian(s) does not apply to students who are 18 years or older, or where a student is 16 or 17 years old and has withdrawn from parental control.
- 3.4 **Resident Pupil:** A student is entitled to attend a school without fee in a school board's jurisdiction in which they are qualified to be a "resident pupil" in accordance with the *Education Act*. A student becomes a resident pupil if they enroll in a school in their school board's jurisdiction, or in a school operated by another board, that pays fees on behalf of the student.

To qualify as a resident pupil for the purposes of elementary public schools, the student must reside in the school board's jurisdiction along with their parent/guardian. To qualify as a resident pupil for the purposes of secondary school and to attend school without a fee, the student must reside in the school board's jurisdiction along with their parent/guardian (if under 18, or 16 and 17 and have not withdrawn from parental control).

- 3.5 **Non-Resident Pupil:** Students who would not qualify as a “resident pupil”, and includes but is not limited to students from outside Peel Region within Ontario; students with parents/guardians who reside outside Peel Region within Ontario; students from outside Ontario; students with parents/guardians who reside outside Ontario; students living on a First Nation, Metis, or Inuit Reserve, or students from outside Canada.
- 3.6 **Student or Pupil:** Pupil under the *Education Act*.
- 3.7 **Tuition Fees:** Fees required in return for educational services provided and may be requested from any student who is from another country or whose parent(s)/guardian(s) reside in another province in Canada. They are payable in advance of student attendance at a PDSB school.

## 4. Procedure

### General

- 4.1 The PDSB recognizes its primary responsibility to provide education to students who are resident pupils of the Board. Resident pupils have the right to attend a school which is designated to serve their residential address.
- 4.2 Non-resident pupils who otherwise meet requirements as set out in the *Education Act* permitting them to attend PDSB with or without payment of a tuition fee (as applicable), may be admitted subject to space and program availability, and include:
- a) Resident pupils of another school board’s right to attend more accessible elementary school, under s. 35 of the *Education Act*.
  - b) Admission of an adult student who is not a resident pupil, under s. 37 of the *Education Act*, but subject to s. 49.2. The Board may direct such students to adult or continuing education in accordance with applicable Board procedure and the *Education Act*.
  - c) Resident pupils of another school board’s right to attend secondary school in another district or zone, under s. 39(1) of the *Education Act*. (a) that is more

accessible to the student than any secondary school in their own school board's jurisdiction in which they're qualified as a resident pupil, or (b) for the purposes of providing continuing education courses or classes operated by PDSB to adult students under s. 49.2 of the *Education Act*.

- 4.3 Students who are Canadian citizens, permanent residents, refugee claimants, undocumented students or dependents of work permit holders or full-time study permit holders under the *Immigration and Refugee Protection Act* (Canada) should be registered in accordance with all eligibility requirements in this Procedure.
- 4.4 Students that do not fit into the above categories must be referred to the We Welcome the World Centre at [address] to verify their eligibility for admission as fee-paying or non-fee-paying students, and for receipt of a School Admission letter, where applicable.
- 4.5 Students without immigration status who otherwise meet the eligibility requirements in this Procedure are entitled to admission to school as per the *Education Act* and Ministry guidance documents. These students must be referred to the We Welcome the World Centre.
- 4.6 Support should be sought from the responsible Board department for circumstances that may not be addressed by this Procedure.

### **Compulsory Attendance**

- 4.7 In compliance with the *Education Act*, and unless excused from attendance under s. 21 of the *Education Act*,
  - a) every person who attains the age of six (6) years ("compulsory school age") on or before the first school day in September of that calendar year shall attend school on every school day from the first school day in September in that calendar year until the person attains the age of 18 years; and
  - b) every person who attains the age of six (6) years after the first school day in September of that calendar year shall attend school on every school day from the first school day in September in the next succeeding year until the

last school day in June in the year in which the person attains the age of 18 years; and

- 4.8 Attendance in both the junior kindergarten and senior kindergarten programs are not compulsory unless, consistent with the *Education Act*, a child has been enrolled as a pupil in junior or senior kindergarten program in an elementary school, at which point, they are considered compulsory school age, regardless of their age, and their attendance is compulsory.
- 4.9 PDSB promotes full time attendance in junior and senior kindergarten programs whenever possible, as most children readily adapt to full-day learning in a caring, well-supervised kindergarten environment. Students benefit from the social/emotional opportunities provided in this environment and are provided with a strong foundation for learning.

#### **Student Registration Procedure**

- 4.10 **Kindergarten:** The parent/guardian of the student must complete a registration form – either online or in hard copy and submit to the school. The school is required to have the parent/guardian complete and sign a form attesting to the information provided on the form.
- 4.11 **Grade 1-12:** the parent/guardian or student (where 18 years or older, or 16 or 17 and withdrawn from parental control) must complete the hard copy Student Registration Form for grades 1 to 12 and submit to the school. Supporting documentation required for registration as set out below must be presented and/or provided to the school.
- 4.12 **Students New to Canada:** Students new to Canada must contact or be directed to the We Welcome the World Centre to begin the registration process and verify their eligibility for admission as fee-paying or non-fee-paying students, and for receipt of a School Admission letter, where applicable.
- 4.13 School office staff will record eligible students in the school enrolment register in accordance with the Ministry of Education's Enrolment Register Instructions for Elementary and Secondary Schools, as amended per school year.

- 4.14 **NOTE:** The Ministry of Education directs that photocopies not be taken of student's personal or immigration documentation (e.g. birth certificates, passports, visas). These documents should generally be presented as originals for verification by relevant Board staff. The registration form contains an attestation section to be completed by school staff indicating they have reviewed the appropriate documents and captured all necessary information.
- 4.15 Completed registration forms and/or online attestation forms should be stored in the student's Ontario Student Record (OSR). Photocopies of a student's personal or immigration documentation must not be retained in the student's OSR at the time of registration. The only documents that may be photocopied and placed in the OSR are records of legal guardianship.
- 4.16 The Principal has discretion to seek further documentation if they have reason to doubt the authenticity of any document presented to the school. Any registration decisions based on false, misleading or photocopied documentation where originals are required can be changed or rescinded at any time by the school principal or superintendent.

### **Eligibility Requirements**

- 4.17 A student has the right to attend a PDSB school where they meet the following qualification requirements as to age, residence, and guardianship, as set out in the *Education Act*. The student must also comply with the *Immunization of School Pupils Act*.
- 4.18 A resident pupil, as defined in the *Education Act*, has the right to attend a PDSB school without payment of a tuition fee. The *Education Act* also prescribes when a non-resident pupil must be charged tuition fees.
- 4.19 It is the responsibility of the parent/guardian to present and/or provide evidence confirming the student's right to attend a PDSB school, including proof of age.
- 4.20 Eligible students have the right to register in a school at any point during the school year.

### **Age Requirements**

- 4.21 Children may register for junior kindergarten in September of the calendar year in which they turn four (4) years of age, and senior kindergarten in September of the calendar year in which they turn five (5) years of age.
- 4.22 A student who otherwise meets the eligibility requirements in this Procedure may become a resident pupil of the board at four (4) years old with respect to junior kindergarten, and five (5) years old with respect to senior kindergarten.
- 4.23 Subject to any age exceptions set out in the *Education Act* or regulation (O.Reg 298) for students in receipt of special education programs and services, students under four (4) years of age are not permitted to register for school.
- 4.24 Students are eligible to attend school until June of the year in which they turn 21 years of age, after which they may be directed to continuing education credits or adult education schools. Adult students will generally be directed to adult and continuing education in accordance with the *Education Act*.
- 4.25 A student that turns 18 years of age has reached the legal age of majority and is considered an adult.
- 4.26 **Proof of Birth Date**
- a) Before enrolment and at the time of registration, the student or parent/guardian must provide proof of birth date through one of the following acceptable documents:
    - i. Canadian passport (valid or expired no more than five years)
    - ii. Birth certificate from Ontario or other Canadian province or territory (issued under Vital Statistics Act)
    - iii. Baptismal Certificate
    - iv. Canadian Certificate of Registration of Birth Abroad
    - v. Certified Statement of Live Birth from Ontario, or other Canadian province or territory

- vi. Certificate of Canadian Citizenship or Certificate of Naturalization (paper document or card, not commemorative issue)
  - vii. Certificate of Indian Status (paper or plastic card)
  - viii. Registered Indian Record (certified)
  - ix. Valid Permanent Resident Card (must be valid or expired no more than five years)
  - x. Confirmation of Permanent Residence (IMM 5292 or IMM 5688)
  - xi. Canadian Immigration Identification Card
  - xii. Letter from Immigration and Refugee Board of Canada confirming Convention Refugee or Protected Person Status under the *Immigration and Refugee Protection Act* (Canada)
  - xiii. Protected Person Status document
  - xiv. Temporary Resident Permit issued under the *Immigration and Refugee Protection Act* (Canada) (restrictions apply)
- b) **NOTE:** Ontario Ministry of Health cards do not quality as proof of birth date.
- c) **NOTE:** The Ministry of Education directs that proof of birth date documentation must be originals and must not be photocopied. The registration form contains an attestation section to be completed by school staff indicating they have reviewed the appropriate documents and captured all necessary information. Completed registration forms and/or online attestation forms should be stored in the student's Ontario Student Record (OSR). Photocopies of a student's personal or immigration documentation must not be retained in the student's OSR at the time of registration.

### **Guardianship Requirements**

- 4.27 The requirement for legal guardianship is necessary to ensure important school decisions affecting the academic, social, psychological and physical well-being of

a student under 18 years old is determined by a caregiver recognized by Ontario law.

- 4.28 Sections 33 and 36 of the *Education Act* provide that a person has the right to attend school without the payment of fee if both the person and the person's parent or guardian resides in the jurisdiction of the Board. The *Education Act* defines "guardian" as "a person who has lawful custody of a child, other than the parent of the child".
- 4.29 **NOTE:** The only documents that may be photocopied and placed in the OSR are records of legal guardianship.
- 4.30 **NOTE:** A parent/guardian registering a student is responsible for providing accurate information relating to custody of the student and the Board is entitled to rely on that information.
- 4.31 , including by informing staff of whether another guardian has joint custody of the student. A court order is required to confirm whether a guardian has sole custody of a student. The de facto presumption without a court order generally is that both parents of a student have joint custody.
- 4.32 If not informed otherwise, both parents have equal rights of custody and access to the child.
- 4.33 Changes to that, including sole custody or no access, require court order. Access rights.
- 4.34 **Custodianship**
- a) If a student has an Ontario address but the parents have address(es) outside Ontario, an Ontario court order transferring custody from the parents to an adult resident within Ontario is required.
  - b) A court order is not necessary (although it is preferred) where *all* of the following criteria are met:
    - (i) Student is a Canadian citizen or a permanent resident;



- (ii) The guardian is a member of the student's immediate family (as defined in Ministry Memorandum 2018 SB08) and resides in Ontario in the school board jurisdiction in which the student wants to attend school. "Immediate family" for the purposes of validating a guardianship arrangement for grant purposes is defined as:
- the student's father, mother, grandfather and grandmother;
  - the student's brothers and sisters and their lawful descendants who are not minors; or
  - the student's uncles and aunts by blood relation and their lawful descendants who are not minors;
- (iii) The guardian assumes full care and well-being of the student, and the student is residing with the guardian throughout the custody period; and
- (iv) A written agreement is in place between the parents of the student and guardian (where the guardian is not the parent) that sets out all of the above, as well as the respective responsibilities of the parents and guardian.
- c) **NOTE:** Where the above criteria are met, the guardian must nonetheless be able to provide required personal and immigration documentation for verification to determine eligibility, including originals as set out in this Procedure.
- d) Occasionally, a student under 18 years may be residing with an adult who is neither their parent or guardian, as a result of family disruption or other extenuating circumstances. These students must be directed to a We Welcome the World Centre. The Board may, in its discretion, allow such a student to conditionally register in the school while legal guardianship arrangements are being made, and may monitor the progress of those arrangements until completion in accordance with timelines established by the Board. The student's parent and/or intended guardian are responsible for facilitating legal guardianship arrangements in a timely manner. Failure to

complete the legal guardianship arrangements in a timely way may result in the student being demitted from the school.

- e) Students who are 16 or 17 and have withdrawn from parental control are not required to show proof of guardianship.

#### 4.35 **Students in Society Care**

- a) Students who are in interim or extended society care who meet all eligibility requirements in this Procedure qualify as resident pupils and must provide a copy of the Society Care letter and a court ordered document. This documentation will be copied and kept in the Ontario Student Record.

#### **Proof of Address/School Boundary Requirements**

4.36 Students have a right to attend a school within the PDSB which is designated to serve their residential address. Students who wish to attend a school other than their home school must adhere to the Board's Flex Boundary Policy.

4.37 Schools are responsible for verifying if the student's parent(s) or guardian(s) reside within the school boundaries.

4.38 Parents/guardians must provide proof of residence indicating their name and address at the time of registration through one of the following acceptable documents:

- i. Purchase or rental agreement
- ii. Lease or deed
- iii. Mortgage statement or insurance policy
- iv. Current utility bill
- v. Current property tax bill
- vi. Current home phone/internet/cable bill
- vii. Bank statement or document from a financial institution.

4.39 **NOTE:** As per Ministry direction, a driver's license does not qualify as proof of residence.

4.40 Principals and school office staff should be mindful that some students are in precarious housing situations and may not be able produce the proper proof of address documentation. In such situations, please contact the We Welcome the World Centre for more information.

#### **Residency Status Requirements**

4.41 Schools are required to check and verify if the student enrolling is a Canadian citizen, permanent resident, or international student with appropriate immigration documentation and admit accordingly.

4.42 A student who is a Canadian citizen, permanent resident, refugee claimant or dependent of a work permit holder or a full-time study permit holder at a university, college or institution in a certificate, diploma or degree program in Ontario under the *Immigration and Refugee Protection Act (Canada)* may register at the student's home school based on their proof of address.

4.43 Students who do not fall into the above categories are required to provide documentation verifying their residency status in Canada. Students who do not have proof of Canadian citizenship or permanent resident status must be referred to the We Welcome the World Centre.

4.44 A student will be registered as a pupil of the board once they fall into one of the above categories. Confirmation of appropriate immigration documentation confirming their status in the category should be reviewed by the school prior to updating the student's information.

4.45 Fees will be charged to students from outside Canada attending PDSB, subject to the exceptions set out in subsection 49(7) of the *Education Act* and related guidance documents.

#### **4.46 Study Permit and Visitor Permit Holders**

- a) Students from outside Canada must obtain a study permit when engaging in a full-time certificate, diploma or degree study program that is more than six (6) months in duration.

- b) Students from outside Canada with study permits or a visitor permit from Immigration authorities are to be directed to the We Welcome the World Centre to determine whether they are required to pay tuition fees or qualify for an exemption under the *Education Act*. The We Welcome the World Centre, in consultation with relevant Board departments, will determine whether a student qualifies for a waiver of tuition fees under the *Education Act*.
- c) A study permit is required for students under 18 years old who are children of a temporary resident (visitor) who is not authorized to work or study.
- d) **NOTE:** Students under 18 years old already in Canada who otherwise meet the eligibility requirements in this Procedure can study without a study permit at the pre-school, primary or secondary level, if:
- (i) are either accompanying parents claiming refugee status or are claimants themselves;
  - (ii) one of their parents (biological or adoptive) is a Canadian citizen or permanent resident;
  - (iii) one of their parents (biological or adoptive) is authorized to work or study in Canada; this includes temporary residents who are:
    - work permit holders,
    - study permit holders,
    - visitor status holders (e.g., visitor record holders) who are either authorized to work without a permit, or authorized to study without a permit, as per the *Immigration and Refugee Protection Regulations* (Canada); or
  - (iv) neither parent is physically in Canada.

#### 4.47 Applicants for Permanent Residence

- a) Under section 49(7)(d) and subsection 49(7)(e)(ii) of the Education Act: A board shall not charge a fee to a person if that person is awaiting

determination of an application for permanent residence in Canada under the *Immigration and Refugee Protection Act (Canada)* ... , (e) a person if their parent or someone else with lawful custody of them is in Canada, (ii) as a permanent resident within the meaning of the *Immigration and Refugee Protection Act (Canada)* or is awaiting determination of an application for permanent residence in Canada under the *Immigration and Refugee Protection Act (Canada)*.

- b) To qualify for a fee exemption under this provision, the student and their parent must provide the board with evidence that are permanent residents or have filed an application for permanent residence with an intention to remain in Canada and are awaiting a determination. School board staff should review the “Stage 1 approval letter” or equivalent documentation (e.g. an email confirmation) from Immigration, Refugees, and Citizenship Canada (IRCC), signifying that the applicant has met most of the eligibility requirements for the immigration class and has acquired approval in principle subject to meeting the remainder of the approval requirements.
- c) Once the documentation is reviewed by the school board, the student will be considered to have met the criterion of “awaiting determination of an application for permanent residence” and can be registered as a “pupil of the board”. Where an application to a PDSB school is based on an established intention for the family to remain permanently in Canada, alternative evidence may be accepted to support the student’s claim of awaiting determination of an application for permanent residence in Canada where the Stage 1 approval letter and/or other equivalent documentation from IRCC is pending.

#### 4.48 **Work Permit Holders**

- a) Under subsection 49(7)(e)(i) of the *Education Act*. A board shall not charge a fee to: (e) a person if their parent or someone else with lawful custody of them is in Canada, (i) under a work permit or awaiting the determination of

an application for a work permit under the *Immigration and Refugee Protection Act* (Canada).

- b) To qualify for a fee exemption under this provision, the student's parent or guardian must provide the board with evidence that IRCC has approved their application for a work permit (through an email confirmation or in the form of a letter).

#### 4.49 **Students Without Legal Immigration Status**

- a) **NOTE:** There are cases in which students who request admission to a PDSB school do not have documents verifying their legal residency status in Canada. Section 49.1 of the *Education Act* provides that "a person who is otherwise entitled to be admitted to a school and who is less than eighteen years of age shall not be refused admission because the person or the person's parent or guardian is unlawfully in Canada". Provided all other eligibility requirements in this Procedure with respect are met, the student shall not be refused admission and the payment of a fee is not required. For greater certainty, section 49(6) of the *Education Act*, which requires payment of a fee to certain classes of temporary residents, does not apply to persons who are in Canada unlawfully.
- b) **NOTE:** All students who otherwise meet the eligibility requirements in this Procedure will be welcomed, regardless of their immigration status. School staff are not to share information about the student or their families with Immigration authorities.
- c) Such students and families must be directed to the We Welcome the World Centre to confirm registration. Confirmation of registration will be presented to the student's home school.
- d) Where the usual documentation is not available to verify a student's name, home address, or date of entry in Canada, the Board will accept letters from lawyers and notary publics confirming their personal knowledge of the student's circumstances.

- e) Schools will continue to comply with current Ministry of Education requirements for funding criteria and verification of date of entry to Canada for all students whom ESL funding claims are made. Date of Arrival information is required for ESL grant purposes only and the absence of this information on the registration form will not prevent admission to school nor limit the student's access to ESL school resources where all other eligibility requirements as met.

### **Students who are Currently or Have Been Expelled by Another Educational Institution**

- 4.50 For the purposes of section 314 of the *Education Act*, the registration form will require confirmation of whether the student is currently expelled or has been expelled from another educational institution and has not been readmitted following successful completion of a required program for expelled students. Parents/guardians are responsible for providing accurate information regarding a student's status with respect to expulsion from another educational institution.
- 4.51 Students who are currently expelled or have been expelled by another educational institution may be admitted to a PDSB school where all other eligibility requirements with respect to age, guardianship and residence are met. Any admission is conditional on the student's successful completion of a required program for expelled students as set out in Board procedure.

### **Eligible Students for ESL Grant Funding**

- 4.52 Students that generate ESL Grants for Student Needs Funding must satisfy the following criteria:
  - a) The student is a "Pupil of the board" under 21 years of age, as of December 31st of the current year;
  - b) The student is enrolled in a school of the board on the October count date of the current school year;

- c) The student is born in a qualifying country. For ESL, students born in countries other than Canada, Great Britain, Ireland, the United States, Australia, and New Zealand would be eligible for ESL funding;
- d) The student entered Canada for the first time during the current or last four school years.
- e) A date of entry stamp in a student’s passport will be requested as proof of entry into Canada. Date of entry is the date that the student enters Canada to live, not a short-term visit/vacation in Canada taken beforehand.

## 5. Reference Documents

### Legislative

*Education Act, R.S.O. 1990 c.E.2*

*Ministry of Education: Ontario Schools, Kindergarten to Grade 12 – Policy and Program Requirements, as amended*

*Ministry of Education: Enrolment register instructions, as amended*

### Guidance Documents

Ministry Memorandum 2018:SB08 – Clarification of Policies and Supporting Documentation to Confirm Pupil Residency and Eligibility Status

Ministry of Education: Enrolment Register Instructions, as amended per school year

## 6. Revision History

Review Date	Approval Date	Description



Governance and Policy Committee, April 12, 2023

# Records Retention Schedule

**Strategic Alignment:**

*Education Act*

*Evidence Act*

*Municipal Freedom of Information and Protection of Privacy Act*

*Ontario Association of School Board Officials*

*Personal Health Information Act*

**Report Type:**

Recommendation

<i>Prepared by:</i>	Oriana Sharp, Privacy and Information Officer Kathryn Lockyer, General Counsel and Governance Officer
<i>Submitted by:</i>	Rashmi Swarup, Director of Education

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## Overview

### **Recommendation:**

That the Records Retention Schedule, attached as Appendix A, be approved and adopted as a by-law.

### **Highlights:**

- The Records Retention Schedule establishes records series, accountability for records and the final disposition of records specifically whether they can be destroyed or archivally preserved;
- Retention periods are modelled after relevant legislation and operational need.

### **Background:**

School boards are required to comply with information access and privacy legislation and must be able to fulfill requests for information from individuals or organizations in an efficient, thorough and timely manner. In order to accomplish these tasks, a comprehensive records management program must be in place.

Records management refers to the creation, maintenance, use and disposal of the records of an organization throughout their entire lifecycle.

Records management ensures:

- The protection of records vital to the administration and governance of the Board;
- The protection of valuable historical records of the Board;
- A common expectation of available and accessible information;
- A framework for effective, efficient and economical information management practices>

A Records Retention Schedule is a foundational component of a sound records management program. It provides guidelines governing the minimum amount of time a record must be maintained and its disposition based on legislation and operational need.

The Privacy and Information Management Committee of the Ontario Association of School Board Officials (OASBO) developed a Generic Records Retention Schedule that can be applied to the core functions of any Ontario school board. The Records Retention Schedule attached is based largely on the precedent created by OASBO. It is consistent with other school boards as well.

A Record Retention Schedule is a “living” document. Updates and revisions to both the nature of records retained and the retention periods applied to them continuously evolve. It is the responsibility of the Privacy and Information Management Officer to ensure the retention schedule is routinely reviewed and revised to accommodate these updates.

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## Evidence

### **Findings/Key Considerations:**

#### Organization of the Records Retention Schedule

The purpose of this schedule is to guide staff in making appropriate decisions for records to ensure that they are kept as long as legally and operationally required and that obsolete records are disposed of in a systematic and controlled manner.

The schedule applies to all Peel District School Board (PDSB) employees.

Records are categorized by their content regardless of their format (e.g., paper, video, audio microfilm or electronic). Records are further organized by business function. The Records Retention Schedule specifies the following business sections:

- Administration
- Public Engagement and Communications
- Facilities and Environmental Support Management
- Financial Management
- Legal and Governance
- Human Resources, Partnerships and Equity Management
- Planning and Accommodation
- Curriculum, Instruction and Assessment
- Safe and Caring Schools (Student Services)

Additional functions, if needed, will be added in consultation with the business sections.

#### Purpose of a Retention Schedule

All recorded information must be identified in a Retention Schedule and must not be destroyed or removed from the control or custody of the Board except as authorized in the schedule.

Additional records may be stored at the discretion of the principal, controller, executive lead, superintendent, Associate director, director of education or designate.

For records management, access and privacy purposes, there should be only one complete official retention copy of each record. Back-up copies should be prepared only when there is sufficient need for authenticity of the original record, when they are considered vital records and to provide ease of access.

#### Exceptions

The Schedule excludes all reference, resource and library material such as books, articles and external publications which are not official records of the Board.

#### Maintenance of the PDSB's Retention Schedule

The following process will be followed in maintaining the Board's retention schedule:

- Train staff in records retention procedures;
- Establish a regular schedule for disposal of records, normally once a year;

- 
- Review the retention schedule on an annual basis and update as required.

## Impact Analysis

### **Board or Ministry Policy Alignment:**

This schedule is an integral step in building a comprehensive records management program. This Retention Schedule aligns with the *Education Act*, the Ontario Student Record guidelines and the *Municipal Freedom of Information and Protection of Privacy Act*.

### **Resource/Financial Implications:**

Setting standards and expectations helps promote the effective and efficient use of resources. There are no direct financial implications of approving and implementing this schedule.

### **Legal implications:**

Setting out clear responsibilities and standards for managing records reduces the risk of potential liabilities.

### **Risk Assessment:**

Setting clear expectations reduces reputational risk and increases public confidence in Peel District School Board.

Establishing guidelines ensures a better understanding of roles and responsibilities thus reducing the risk of regulatory non-compliance.

### **Community Impact:**

A records retention schedule increases public trust and confidence in PDSB. In the event of a request for information, records can be more easily located or their disposal justified.

## Next Steps

The Records Retention Schedule, once approved by resolution, will be posted on the internal and external PDSB websites.

### **Action Required:**

- Develop a disposal form for the approval of the destruction of records with the appropriate level of sign-off;
- Develop procedures to guide staff to take appropriate steps to send inactive records to PDSB's approved off-site records vendor.

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**Communications:**

Communication of the schedule and its requirements will be shared with staff.

Legal and Governance Services staff will provide outreach and advisory services on an ongoing basis.

## Appendices

Appendix A – Records Retention Schedule

# Peel District School Board Records Retention Schedule

Date: April 2023

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## Acknowledgements

Ontario Association of School Board Officials, Privacy and Information Management Committee.

## Records Retention Schedule

These documents provide practical guidance with respect to records maintenance and privacy issues and make reference to portions of applicable legislation including the *Municipal Freedom of Information and Protection of Privacy Act*, R.S.O. 1990, c.M.56; *Personal Health Information Protection Act*, S.O. 2004, c.3, Sched. A; and the *Education Act*, R.S.O. 1990, c.E.2.

They are intended for use by Peel District School Board (PDSB) employees and may be used to support PDSB privacy and information management practices.

PDSB records are vital to the organization. They are the corporate memory of PDSB. The records created in the course of the work of PDSB:

- do not belong to staff;
- are the property of the Board;
- are a corporate asset;
- are important sources of administrative, fiscal, legal, evidential and historical information;
- records must be accessible and available for current and future needs.

All PDSB staff are required to comply with information access and privacy legislation and must be able to fulfill requests for information from individuals or organizations in an efficient, thorough and timely manner. In order to accomplish these goals, a solid records management program must be in place.

Records management refers to the creation, maintenance, use and disposal of the records of an organization throughout their entire lifecycle. Records management also ensures that vital information is available to support the business of the organization.

### Retention Schedule Explained (Example)

**Function:** Records and information in this retention schedule are classified into nine primary functional categories.

**Description:** This explains the Function and details the types of records that are included in the Function.

**Facilities Management**  
**Description:** The function of managing and maintaining board facilities, including supporting capital initiatives and building improvements. Records include reports, requests and logs, environmental testing of facilities, facilities planning and improvements, capital and non-capital expenditures, and management relationships such as parking.

**Record Series:** Subsection of the Function organized by activity.

**Accountability:** The group/department/person is responsible for the record.

Record Series	Accountability	Total Retention	Disposition	Citations/Comments
<b>Assets &amp; Property Management &amp; Maintenance</b>				
<b>Building and Site Approvals</b> <ul style="list-style-type: none"> <li>Includes documentation such as site plan approvals, building permits, Life Safety Plan and municipal reports pertaining to the approval of building plans by the municipality, Fire Marshal's Office, Ministry of Education, Ministry of Health, and other government bodies.</li> </ul>	Facilities	E + 6, E= as long as building remains Board property	Destroy	<ul style="list-style-type: none"> <li>Building Code Act</li> <li>Education Act</li> </ul>

**Citations/Comments:**  
 • Legislation/legal authority guiding the retention.

**Disposition:** How you dispose of the record.

**Record Types:** List of records within the Record Series.

**Total Retention:** Records and information in this retention schedule are classified into nine primary functional categories.



## Retention Schedule Terms and Timeframes

The retention schedule includes a minimum retention period based on applicable legislation and business need. The following explains the Codes used in the Total Retention column of the Records Retention Schedule. The schedule also includes a minimum retention period based on applicable legislation and business need.

### Archival Review

Refers to reviewing the records series before destruction to see whether they have an historic significance prior to destruction. This is different from archival because in the case of an archival designation the entire records series is kept for posterity, whereas in archival selection before destruction records are “selected” for potential historic significance.

### CY (Current School Year)

Refers to September 1st to August 31st.

### FY (Fiscal Year)

Refers to September 1st to August 31st.

### Destroy

Requires that upon expiration of the retention period the document is destroyed – shredded, recycled, deleted (expunged).

### S/O

Refers to the replacement of a document once it has been updated or revised. The new document supersedes the previous version.

### E (Event)

Trigger for disposition. The trigger is the item that has to happen to start the retention period.

### PIB (Personal Information Bank)

Refers to records in which individuals are identifiable. (e.g. home address, phone number, social insurance number, image/photo, employee number). This information is protected under MFIPPA.

# Classification & Retention Schedule

## Administration

**Description:** The function of overseeing the administration of the team and units within the board/authority and schools. Records supporting this function relate to administrative committees’ decisions and meetings, and internal administrative support or services. The functions of acquiring and managing equipment, supplies, services and materials for schools.

Record Series (Administration)	Accountability	Total Retention	Disposition	Citations/Comments
ACCESS & PRIVACY				

<p>Access Requests for Information Includes requests and tracking sheets for Freedom of Information Requests made under the Municipal Freedom of Information Act. Requests for access to student/employee records and information.</p>	<p>Freedom of Information, School, HR</p>	<p>E + 2 years E= appeal period expires+2 years</p>	<p>Destroy</p>	<p>PIB Ont.1, Ont.2, Ont. 4</p>
<p>Information Breaches Tracking sheets. Records relating to the resolution of breach.</p>	<p>Freedom of Information, Privacy, Records and Information Management</p>	<p>E + 2 years E = Final resolution of the breach + 2 years</p>	<p>Destroy</p>	<p>PIB Ont.1, Ont.2, Ont. 4</p>
<p><b>INFORMATION TECHNOLOGY</b></p>				
<p>Access Control and Password Records Access Control and Password Records Records related to the management of and access to programs. Includes individual access, password management, etc.</p>	<p>I.T. Services</p>	<p>E + 1 year  E = termination of employee.</p>		<p>Operational</p>

Record Series (Administration)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Backup Tapes Backup tapes are considered transitory records until they are required in the event of a disaster or the district is required to access for data recovery.</p>	<p>I.T. Services</p>	<p>E + 1 year  E = termination of employee.</p>		<p>Operational</p>
<p>Functional, Technical Specifications Includes records regarding systems development functional and technical specifications and requirements, such as background requests, requirement definitions, studies, surveys, stakeholder engagement information and business cases used to design/develop software/hardware specifications. Also includes acceptance/compatibility criteria, modeling, final specifications and supporting documentation.</p>	<p>I.T. Services</p>	<p>E + 3 years  E = Life of System</p>		<p>Operational</p>

Record Series (Administration)	Accountability	Total Retention	Disposition	Citations/Comments
<p>IT Helpdesk Includes records regarding the performance of typical daily helpdesk functions for the district. Records include helpdesk submissions background documentation submitted by the user, scripts used by the helpdesk to respond to inquiries.</p>	<p>I.T. Services</p>	<p>E + 1 year E= until ticket resolved</p>		<p>Operational</p>
<p>Information System and Architecture Documentation Records relating to the design of computer systems and/or software, including needs assessments, business cases, project charter, process flowchart documentation, impact analysis, user and system requirements, specifications, testing plans and results, user sign-offs, project management meeting minutes/documentation, system development documentation, software design records, and software inspection notes.</p> <p>Also includes records on system installations/conversions and product evaluations.</p> <p>May also include requests for significant modification, fixes and upgrades.</p>	<p>I.T. Services</p>	<p>S + 2 years</p>		<p>Operational</p>

Record Series (Administration)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Telecommunications Systems Records relating to the management, maintenance and use of telecommunications including landline and wireless mobile devices and equipment.</p> <p>Includes system documentation, configuration details and services provided</p>	I.T. Services	<p>E + 3 years</p> <p>E= life of system</p>		Operational
<b>MEETINGS MANAGEMENT</b>				
<p>External Meetings: Associations/ Organizations/ Government</p> <p>Includes reports, newsletters, publications, conference and workshop information and proceedings from meetings between the school board and external organizations.</p>	Originating site	CY + 3 years	Destroy	
<p>Internal Meetings: Administrative and Staff</p> <p>Includes records regarding staff meetings, student council and committees such as principals' council, secretaries' meetings, as well as district and subject head meetings. Records include agendas, minutes, reports and resolutions. (Excludes Board Minutes and Agendas. )</p>	Originating site or meeting chair	CY + 3 years	Destroy	

<b>Record Series (Administration)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/Comments</b>
<b>OFFICE SERVICES</b>				
Board Internal Services Records relating to translation, audio visual services, duplicating/printing services, mail/courier and delivery services. Requisitions and memos for services, confirmations and service logs/reports, correspondence, reports, etc.	Board Services	CY + 3 years	Destroy	
<b>RECORDS &amp; ARCHIVES MANAGEMENT</b>				
Archives Management Policies and procedures regarding archives management.	Office of Archives and Records Management	S/O + 1 year	Archival Review	
Forms Management Includes forms history, creation, revision, and retirement date.	Originating Site	S/O +1 year	Destroy	
Records Disposition Lists of stored and destroyed records, retention schedules	Freedom of Information, Privacy, Records Information Management	Life of Board + 5 years	Life of Board + 5 years	Ont. 31

## Public Engagement and Communications

**Description:** The function of promoting and marketing boards/authorities/schools and programs and services. Records in this function include board/authority/school communication and press releases, speeches, websites, public relations activities, events and news releases; materials relating to marketing research, publications and reports.

<b>Record Series (Public Engagement and Communications)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/ Comments</b>
<b>EVENT MANAGEMENT</b>				
<b>Events</b> Includes memos, notices, correspondence with parents and others, programs and all related materials pertinent to events sponsored by the board or by schools (e.g. parents’ night, school opening ceremonies, reunions, etc.).	Communications or Site Specific	CY + 1 year	Archival Review	
<b>MEDIA &amp; PUBLIC RELATIONS</b>				
<b>Commendations, Awards &amp; Recognition</b> Includes commendations received from the general public and parents regarding various programs and the treatment of students, certificates of appreciation, and awards of recognition of staff.	Communications or Site Specific	CY + 1 year	Archival Review	PIB Ont. 1, Ont. 2, Ont. 4

Record Series (Public Engagement and Communications)	Accountability	Total Retention	Disposition	Citations/ Comments
<p><b>Complaints</b> Includes records related to general complaints about the board/school and its activities. Includes correspondence, investigations, findings, and related reports regarding resolution. Complaints about a specific project or program may be contained within the program. (Excludes complaints specific to an individual student or staff member. )</p>	<p>Communications or Site Specific</p>	<p>E + 1 year E = date of complaint</p>	<p>Destroy</p>	<p>PIB Ont.1, Ont. 2, Ont. 4</p>
<p><b>Contact and Mailing Lists</b> Includes all lists of individuals or organizations to whom Board and school communications are sent for information purposes. Includes telephone directories, principal’s visitor book, emergency contact lists, etc.</p>	<p>Site Specific</p>	<p>S/O</p>	<p>S/O</p>	<p>PIB Ont. 4</p>
<p><b>Media Relations and News Releases</b> Includes records regarding Board relations with the various media organizations. Records include press releases and information releases.</p>	<p>Communications</p>	<p>CY + 3 years</p>	<p>Archival Review</p>	
<p><b>News Reports</b> Includes news reports from newspapers, magazines, websites and other publications regarding the board/authority, school, staff, students and trustees.</p>	<p>Communications</p>	<p>CY + 1 year</p>	<p>Archival Review</p>	



<b>Record Series</b> <b>(Public Engagement and Communications)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/ Comments</b>
<b>Photographs</b> Includes class photos, yearbook photos, and officials/trustees group photos.	Communications or Site Specific	CY + 1 year	Archival Review	PIB Ont. 4
<b>Public Relations</b> Includes recorded information regarding the Board’s relations with the public as well as recorded information relating to the production and distribution of information to the public, outside agencies, and schools.	Communications	CY + 1 year	Destroy	
<b>Publications</b> Includes all publications produced for the Board by the Communications Department	Communications	S/O + 5 years	Archival Review	
<b>Speeches and Presentations</b> Includes speeches and presentations prepared for delivery by Board/school staff and elected officials.	Communications or Site Specific	CY + 3 years	Archival Review	

Record Series (Public Engagement and Communications)	Accountability	Total Retention	Disposition	Citations/Comments
<b>SCHOOL PERSONAL COLLECTIONS</b>				
<p><b>Memorabilia</b> Includes records regarding school, program, department, and/or board memorabilia, collectibles and other historical items which reflect the individual nature of the schools, programs and departments such as informal school histories, school logos and crests, songs, names, colours, equipment, reference material, etc.</p> <p>For Photographs See: <a href="#">Media &amp; Public Relations - Photographs</a></p>	Communications or Site Specific	CY + 1 year	Archival Review	PIB Ont. 4

## Facilities and Environmental Support Management

**Description:** The function of managing and maintaining board/ authority buildings and facilities and supporting capital initiatives and building improvements. Records include maintenance and operations reports, requests and logs, environmental testing of facilities, equipment maintenance and testing, facilities planning and improvements, capital and non-capital projects, inspection reports, and records relating to property acquisition and disposition, building and office renovations, security, and property management relationships such as parking.

<b>Record Series (Facilities and Environmental Support)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/ Comments</b>
<b>ASSETS &amp; PROPERTY MANAGEMENT &amp; MAINTENANCE</b>				
Building and Site Approvals Includes documentation such as site plan approvals, building permits, Life Safety Plan and municipal reports pertaining to the approval of building plans by the municipality, Fire Marshal's Office, Ministry of Education, Ministry of Health, and other government bodies.	Facilities	E + 15 years E = as long as building remains on Board property	Destroy	Ont. 35, Ont. 55, Ont. 142, Ont. 143, Ont. 145, Ont. 150, Ont. 174, Ont. 184, Ont. 190, Ont. 194
Drawings and Specifications Includes technical specifications for a project or property, e.g., mechanical, electrical and structural. Includes building and fire code requirements and architect's instructions. Includes all drawings and plans of schools and offices, such as master drawings and floor plans, site plans, aerial plans, and plans for additions and alterations.	Facilities	E + 15 years E = as long as building remains Board property	Destroy	Vital Ont. 15, Ont. 35
<b>Record Series (Facilities and Environmental Support)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/Comments</b>

<p>Environment Assessments &amp; Studies</p> <p>Includes information relating to soil, tree preservation and mitigation, geotechnical infrastructure expansion, water, air, and other environmental issues.</p>	<p>Facilities</p>	<p>Life of Board + 5 years</p>	<p>Life of Board + 5 years</p>	<p>Ont. 221, Ont. 332</p>
<p>Facilities Construction Projects</p> <p>Includes budgets, estimates, project plans and schedules, progress reports, project meeting minutes, certificates of clearance, project drawings and correspondence regarding the building of schools and other properties.</p> <p>For Capital Projects Financing See: <a href="#">Capital Projects Financing</a></p> <p>For Final (As-Built) Drawings See: <a href="#">Drawings &amp; Specifications</a></p>	<p>Facilities</p>	<p>E + 6 years E = completion of project</p>	<p>Destroy</p>	<p>Ont. 8, Ont. 10, Ont. 15, Ont. 124, Ont. 194</p>

Record Series (Facilities and Environmental Support)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Facilities Improvement Projects</p> <p>Includes project records regarding the building improvements program and supporting documents specific to additions, renovations, and alterations to schools and buildings.</p> <p>Records include project drawings, project plans, meeting minutes, project updates, budgets, etc.</p> <p>For Final (As-Built) Drawings See: <a href="#">Drawings &amp; Specifications</a></p>	Facilities	E + 6 years E = completion of project	Destroy	Ont. 8, Ont. 9, Ont. 10, Ont.11, Ont. 15, Ont. 17. Ont. 19, Ont. 20, Ont. 55, Ont. 175, Ont. 184, Ont. 185, Ont. 190, Ont. 194
<p>Facilities Planning</p> <p>Includes records regarding the allocation of classroom and workspace to staff and students.</p> <p>Records include correspondence, proposed enrolment studies and reports, facilities use plans, facilities designs and layouts, furniture layouts, etc.</p>	Facilities	CY + 3 years	Destroy	

Record Series (Facilities and Environmental Support)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Maintenance and Operations: Buildings/ Physical Plant and Equipment</p> <p>Includes records related to support the maintenance and operations of buildings, physical plant and equipment.</p> <p>Includes office equipment.</p>	Facilities	<p>E + 5 years</p> <p>E = disposal of facility or equipment</p>	Destroy	<p>Ont. 9, Ont. 10, Ont. 11, Ont. 17, Ont. 18, Ont. 20, Ont. 141, Ont. 142, Ont. 145, Ont. 146, Ont. 147, Ont. 148, Ont. 149, Ont. 150, Ont. 151, Ont. 163, Ont. 164, Ont. 165, Ont. 175, Ont. 177, Ont. 178, Ont. 179, Ont. 180, Ont. 182, Ont. 183, Ont. 184, Ont. 185, Ont. 190, Fed. 15</p>
<p>Maintenance and Operations: Grounds</p> <p>Maintenance requisitions, work orders, logs and reports showing actions taken re grounds keeping, snow clearance, and cleaning.</p>	Facilities	<p>E + 2 years</p> <p>E = completion of inspection or completion of maintenance</p>	Destroy	Ont. 34
<p>Land Surveys</p> <p>Includes land survey information such as legal property surveys, construction layout and control surveys, and field notes.</p>	Facilities	S/O	Archival Review	
<p>Parking</p> <p>Records related to parking at sites.</p>	Originating Site	CY + 1 year	Destroy	Ont. 192, Ont. 193

<b>Record Series (Facilities and Environmental Support)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/Comments</b>
<p>Permits/Facility Bookings Includes copies of permits issued by the board for the use of school property for purposes such as polling stations and community events. Also includes applications for permits, lists of permit holders and interjurisdictional permits.</p>	Facilities	E + 2 years E = when permit expires	Destroy	PIB Ont. 1, Ont.2, Ont. 4, Ont. 34
<b>HEALTH, SAFETY &amp; SECURITY</b>				
<p>Accessibility of Services and Information Records relating to the accessibility of services and provision of information to persons with disabilities. Includes records that identify, remove and prevent barriers for persons who work, learn or volunteer in and/or use services in Board facilities.</p>	Human Resources	CY + 6 years	Destroy	Ont. 5, Ont. 43, Ont. 137, Ont. 210, Ont. 211, Ont. 212, Ont. 214
<p>Confined Spaces Includes records relating to the assessment of confined spaces and the written plan and procedures for the control of hazards in confined spaces. For HR Training Records See: <a href="#">Training &amp; Skills Development</a></p>	Human Resources	E + 3 years 3 years; as long as 2 most recent records retained.	Destroy	Ont. 152, Ont. 153, Ont. 154, Ont. 155, Ont. 156

Record Series (Facilities and Environmental Support)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Emergency Plans and Procedures</p> <p>Includes records regarding emergencies and related plans to support the board/school in case of fire or other emergencies. Records include emergency plans and procedures including for lock-downs and business continuity plans.</p>	Facilities	S/O + 5 years	Destroy	Ont. 19, Ont. 32, Ont. 103, Ont. 143, Fed. 9, Fed. 10, Fed. 15, Fed. 42, Fed. 43, Fed. 44
<p>Hazardous, Biological, Chemical or Physical Agents</p> <p>Includes records regarding the monitoring or hazardous chemical &amp; physical agents, and designated substances in accordance with the Occupational Health &amp; Safety Act. NB includes air quality reports, and excludes exposure records.</p>	Human Resources	E + 7 years E = End of reporting period to which relates	Destroy	Ont. 37, Ont. 38, Ont. 39, Ont. 40, Ont. 158, Ont. 163, Ont. 164, Ont. 166, Ont. 167, Ont. 168, Ont. 169, Ont. 176, Ont. 177, Ont. 178, Ont. 220, Fed. 42, Fed. 43, Fed. 44, Fed. 45, Fed. 46, Fed. 47, Fed. 48, Fed. 49
<p>Designated Substances &amp; Hazardous Materials – Waste Monitoring and Management</p> <p>Includes records related to the management and disposal of chemical, biological or physical agents or substances.</p>	Human Resources	E + 5 years Event = Report made	Archival Review	Ont. 181, Ont. 196, Ont. 197, Ont. 215, Ont. 216, Fed. 45



Record Series (Facilities and Environmental Support)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Health and Safety Incident Reports (Board Office)</p> <p>Health and Safety Incident Reports (kept at each school)</p> <p>Includes general records relating to incidents that affect health and safety of staff. For example emergency response, school illness, infections, quarantines, etc.</p> <p>Records include reports, correspondence and summaries, information related to actions taken by staff.</p> <p>For Serious Student Incidents See: <a href="#">Student Discipline</a></p> <p>See also: HUM</p> <p>Employee Incident/Accident Reports</p> <p>For Accident Reports See: <a href="#">Accident/Incident Claims and Reports</a></p> <p>For Claims/Litigation See: <a href="#">Legal Claims/Litigation</a></p>	<p>Human Resources</p>	<p>E + 3 years</p> <p>E = No further appeal + 3 years for adults</p> <p><b>Note:</b> If student is under the age of 21, records must be kept until 21<sup>st</sup> birthday</p>	<p>Destroy</p>	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 34, Ont. 132</p>

Record Series (Facilities Management)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Occupational Health &amp; Safety</p> <p>Includes general recorded information regarding the occupational health and safety of staff and students.</p> <p>Joint Health &amp; Safety Committee minutes, inspections, WHMIS, quarantines, infestations, playground safety, Safety Data Sheets (formerly known as Material Safety Data Sheets), health and safety inspection reports, etc.</p> <p>For Accident Reports See: <a href="#">Accident/Incident Claims and Reports</a></p> <p>For Claims/Litigation See: <a href="#">Legal Claims/Litigation</a></p>	Facilities	CY + 3 years	Destroy	Ont. 33, Ont. 34, Ont. 37, Ont. 39, Ont. 40
<p>Site Security Administration</p> <p>Includes records regarding the security of office and school facilities and properties such as control of keys, trespassing, emergency telephone numbers/contacts, and police station locations.</p> <p>Also includes school visitor book and contractor logs, etc.</p> <p>Excludes video surveillance system records.</p>	Facilities	CY + 2 years	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 19

<b>Record Series (Facilities and Environmental Support)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/Comments</b>
Video Surveillance Reports Includes reports and footage captured through the use of video surveillance in schools and buses.	Facilities	30 Days CY + 1 year if footage is viewed	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
<b>INSPECTIONS AND TESTING</b>				
Fire Protection Systems and Emergency Power Systems Includes records regarding the inspection and testing of emergency power systems, fire extinguishers and fire protection systems.	Facilities	E+2 years E=Report prepared; as long as current and immediately preceding report are available; retained at building premises for examination on request)	Destroy	Ont. 141, Ont.145, Ont.147, Ont. 148, Ont. 149, Ont. 150, Ont.151, Ont. 180, Ont. 184, Ont. 185, Ont. 188, Ont. 189, Ont. 190
Health & Safety Inspection Reports	Health and Safety (Board Office)  Health and Safety (kept at each School)	CY + 6 years	Destroy	Ont. 9, Ont. 11, Ont. 17, Ont. 18, Ont. 20, Ont. 121, Ont. 122, Ont. 123, Ont. 124, Ont. 125, Ont. 126, Ont. 127, Ont. 128, Ont. 129, Ont. 130, Ont. 179, Ont. 189

Record Series (Facilities and Environmental Support)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Logs and Inspection Reports: General</p> <p>Includes all documentation to support the inspection and testing of buildings, equipment, physical plant and property.</p> <p>Records include logs, inspection reports, year-end reports, equipment lists and locations.</p> <p>Includes water flushing logs, water testing reports, elevator logs, sanding and salting logs, playground equipment inspections logs, chemical treatment logs, underground storage tank inspections, playground inspections, physical education equipment inspections, technical program equipment, etc.</p> <p>For Emergency Power Systems Inspections and Testing, See: <a href="#">Fire Protection Systems &amp; Emergency Power Systems</a></p> <p>For Fire Protection Logs and Testing See: <a href="#">Fire Protection Systems &amp; Emergency Power Systems</a></p>	Facilities	CY + 6 years	Destroy	Ont. 9, Ont. 11, Ont. 17, Ont. 18, Ont. 20, Ont. 121, Ont. 122, Ont. 123, Ont. 124, Ont. 125, Ont. 126, Ont. 127, Ont. 128, Ont. 129, Ont. 130, Ont. 179, Ont. 189

## Financial Management

**Description:** The function of managing board/authority/school financial and accounting resources. Includes establishing and operating and maintaining accounting (payables, receivables, revenue) systems, controls and procedures, financial planning, reporting, preparing budgets and budget submissions, and the monitoring and analysis of capital assets. Records include but are not limited to accounts payable and receivable, budgets, audits, benefits accounting, expense payments, financial reporting, fixed asset management and all matters regarding the allocation and control of funds.

Record Series (Financial Management)	Accountability	Total Retention	Disposition	Citations/Comments
<b>ACCOUNTING ADMINISTRATION</b>				
Accounts Payable Includes records documenting funds payable by the Board, such as invoices, employee and trustee expenses, legal fees, vendor transaction listings, payment vouchers, cheque requisitions, utilities and phone bills, petty cash disbursements.	Finance	FY + 6 years	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Accounts Receivable Records relating to the accounting for money owed to schools and boards. Records include invoices, cash receipts, correspondence, cash lists and statements of account.	Finance	FY + 6 years	Destroy	Vital Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Banking Includes records regarding banking transactions and relationships with banks, bank statements, bank reconciliations, deposit records, cancelled cheques, returned cheques, and cheque stubs.	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38

Record Series (Financial Management)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Capital Revenue</p> <p>Includes records related to capital revenue from sale of property and rental income from leased premises and other sources.</p>	Finance	FY + 6 years	Destroy	<p>Vital</p> <p>Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38</p>
<p>Scholarship Funds, Bequests &amp; Donations</p> <p>Records regarding the administering &amp; setting up of scholarship funds &amp; donations, including fund histories, correspondence &amp; data sheets. Background information, copies of wills regarding the administration of the bequests &amp; donations of monies &amp; other materials to the Board.</p>	Finance	Life of Board + 5 years	Life of Board + 5 years	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 6, Ont. 195</p>
<p>Grants &amp; Subsidies</p> <p>Information and records relating to all grants and subsidies for Federal, Provincial and Municipal bodies. i.e. SEA claims &amp; reporting, SIP claims, Section 23 CCTC Reporting.</p>	Finance	FY + 6 years	Destroy	<p>Ont. 14, Ont. 74, Ont. 115, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38, Fed. 40</p>

<p><b>Non-Board Funds</b> Includes records on funds allocated to or raised by the school/parent council, student council or other student, parent or community groups consisting of account receivable and payable documents such as invoices and vouchers.</p>	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
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<b>Record Series (Financial Management)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/Comments</b>
<b>FINANCIAL PLANNING</b>				
<p><b>Budgets</b> Includes departmental and board budgets, both capital and operating. Includes all working notes, budget formula calculations, current estimate highlights, and preliminary formula budget calculation sheet summaries and budgeted vs. actual reports.</p>	Finance	FY + 6 years	Destroy	
<p><b>Capital Projects Financing</b> Includes records relating to the financing of capital projects. Includes quarterly reports, working papers, building monthly costs, capital payment vouchers, approvals, costing, capital expenditure forecasts and correspondence with architects and contractors.</p>	Finance	E + 10 years E = Completion of project	Archival Review	Ont. 13, Ont. 14, Ont. 139, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 20, Fed. 30, Fed. 38
<b>FINANCIAL REPORTING</b>				

<p>Audits - Financial Includes records regarding internal &amp; external financial audits of accounts For Audited Financial Statements See: <a href="#">Financial Statements (Audited)</a></p>	<p>Finance</p>	<p>FY + 6 years</p>	<p>Destroy</p>	<p>Ont. 14, Ont. 99, Ont. 191, Ont. 225, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38</p>
<p><b>Record Series (Financial Management)</b></p>	<p><b>Accountability</b></p>	<p><b>Total Retention</b></p>	<p><b>Disposition</b></p>	<p><b>Citations/Comments</b></p>
<p>Enrolment &amp; Financial Reporting Includes all counts, summaries and projecting documenting enrolments in the school system and statistical reports required by the Ministry of Education as part of the funding process for the preparation of educational statistics, e.g. OnSis October and March school/board reports. Also school audits on enrolment and documentation determining a student's status.</p>	<p>Finance</p>	<p>FY + 6 years</p>	<p>Destroy</p>	<p>Vital Ont. 14, Ont. 114, Ont. 225, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38</p>
<p>Financial Statements (Audited) Includes the balance sheet, income statement, statement of source and application of funds, and other audited financial statements.</p>	<p>Finance</p>	<p>Life of Board + 5 years</p>	<p>Life of Board + 5 years</p>	<p>Ont. 65, Ont. 198</p>



Financial Working Papers Includes all drafts, calculations, grant calculations and other working papers associated with the development of financial statements for the Board.	Finance	FY + 6 years	Destroy	
Funding Assessments Includes records relating to the direction of school support, levies and related assessments. Also includes information on fee-paying, non-resident and international visa students.	Corporate Services	FY + 6 years	Destroy	Ont. 14, Ont. 74, Ont. 225, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
<b>Record Series (Financial Management)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/Comments</b>
Inventory Control: Fixed Assets Records relating to the balance sheet, including fixed asset listings, depreciation details, asset transfer information, and details of extraordinary entries.	Finance	Life of Asset + 6 years	Life of Asset + 6 years	Fed. 19, Fed. 30, Fed. 38
Inventory Control: Non-Fixed Assets Includes all records regarding inventories of board-owned equipment. Excludes hazardous materials inventories.	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Investments & Debentures Includes records regarding the Board's investments, term deposits and promissory notes, records regarding the debentures issued, information on the initial issuance of the debenture and records of payments made to investors.	Finance	E + 6 years E = closure of account, redemption of issue	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38

<p><b>Ledgers: General</b> Includes all records in the books of original entry, whether maintained in book format or as a computer report.</p>	<p><b>Finance</b></p>	<p><b>Life of Board + 5 years</b></p>	<p><b>Life of Board + 5 years</b></p>	<p><b>Fed. 30, Fed. 37</b></p>
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Record Series (Financial Management)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Ledgers: Subsidiary Ledgers, Registers and Journals</p> <p>Includes all subsidiary ledgers, registers and journals such as payment and receipt journals, journal vouchers, payroll registers, purchase order registers, and year-end adjustments.</p>	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
<p>Taxation</p> <p>Includes records documenting taxation such as gas surtax reports, income tax returns and sales tax tables.</p> <p>Also included Harmonized Sales Tax (HST), accounting and information on exemptions and refunds.</p>	Finance	FY + 6 years	Destroy	Ont. 13, Ont. 14, Ont. 139, Fed. 1, Fed. 2, Fed. 3, Fed. 4, Fed. 6, Fed. 8, Fed. 14, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 20, Fed. 23, Fed. 30, Fed. 36, Fed. 38
<b>PAYROLL</b>				
<p>Payroll</p> <p>Includes all records of payments of salary, wages and deductions to employees. Includes payroll master cards, time sheets, direct deposit request forms, payroll update logs, holdbacks, and payroll deduction and billing reports.</p> <p>Also includes T4's, TD's, and ROE's.</p>	Finance	FY + 6 years	Destroy	<p>PIB</p> <p>Ont. 1, Ont.2, Ont. 4, Ont. 16, Ont. 21, Ont. 27, Ont. 131, Ont. 136, Ont. 140, Ont. 170, Ont. 171, Ont. 172, Ont. 206, Ont. 207, Ont. 208, Ont. 209, Fed. 5, Fed 6, Fed. 7, Fed. 8, Fed. 23, Fed. 25, Fed. 26, Fed. 27, Fed. 30, Fed. 33, Fed. 34, Fed. 40, Fed. 41</p>

Record Series (Financial Management)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Pension Contributions/ Support</p> <p>Includes contribution cards detailing pension and benefits obligations due to retired employees under OMERS and other annuity or superannuation plans (TPP). Includes payroll records required to determine and verify pension payments.</p>	Finance	E + 6 years E = until pension is paid out to all beneficiaries	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
<b>PROCUREMENT</b>				
<p>Tenders &amp; Quotations</p> <p>Records regarding tenders &amp; quotations obtained from suppliers of goods &amp; services such as office supplies, construction &amp; pest control. Requests for proposal, requests for quotations, specifications, bonds &amp; all documentation regarding the selection process. Excludes vendors/suppliers/caterers and contracts.</p>	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
<p>Purchase Orders &amp; Purchase Requisition</p> <p>Includes purchase requisitions, purchase orders and blanket orders authorizing the procurement of goods and services.</p>	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38

## Legal and Governance

**Description:** The function of governing boards/authorities/schools and exercising legal authority and control. The corporate governance structure specifies the distribution of rights and responsibilities among different participants in boards/authorities/schools, such as the board and staff, and spells out the rules and procedures for making decisions on its affairs. Includes resolutions, bylaws, policies and procedures, charters, board meeting administration, and strategic planning.

Also, The function of addressing legal issues relating to the operations of the board/ authority and schools. Records include, but are not limited to, claims and litigation files, appeals and hearings, contracts and agreements entered into on behalf of the board/ authority and schools, deeds and titles relating to properties, harassment incidents, etc.

Record Series (Legal and Governance)	Accountability	Total Retention	Disposition	Citations/Comments
<b>AGREEMENTS/CONTRACTS ADMINISTRATION</b>				
Contracts & Agreements Includes all records relating to contracts and agreements.	Operations/ Purchasing	E + 3 years E = Contract Terminated or S/O	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 34
<b>BOARD &amp; COUNCIL ADMINISTRATION</b>				
Administrative Council(s) Includes agendas and minutes of all administrative councils.	Director's Office Board Secretary	CY + 3 years	Destroy	
Articles of Incorporation, By-Laws & Constitution Includes records related to the operation of the School Board as a legal entity.	Director's Office	Life of Board + 5 years	Life of Board + 5 years	Ont. 47
Board Agendas, Minutes and Reports Records relating to Board minutes, agendas and reports, including all back-up material.	Director's Office Board Secretary	Life of Board + 5 years	Life of Board + 5 years	PIB Vital Ont. 47

<b>Record Series (Legal and Governance)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/Comments</b>
<p>Standing &amp; Ad Hoc Committees</p> <p>Includes agendas, reports, and minutes of all Board committees established by statute (Special Education Advisory Committee, Parent Involvement Committee, Audit Committee, Supervised Alternative Learning Committee), or established by the Board of Trustees to consider, on an ongoing or limited basis, a specific fixed area of the Board's operation.</p>	<p>Director's Office</p> <p>Board Secretary</p>	Life of Board + 5 years	Life of Board + 5 years	<p>PIB</p> <p>Vital</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 47</p>
<p>Trustee Records</p> <p>All records and relevant materials relating to position on Board.</p>	Director's Office	<p>E + 4 years</p> <p>E = end of term</p>	Destroy	<p>PIB</p> <p>Ont.1, Ont.2, Ont.4, Ont. 222</p>
<p>Trustees' Register</p> <p>Includes a register of the names, addresses and occupations of trustees, including the dates on which each became or ceased to be a trustee.</p>	Director's Office	Life of Board + 5 years	Life of Board + 5 years	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4</p>
<b>POLICIES, PROCEDURES, DIRECTIVES</b>				
<p>Government Guidelines/ Directives</p> <p>Includes correspondence, guidelines and information provided by government ministries.</p>	Director's Office	S/O	Destroy	<p>Ont. 68, Ont. 81, Ont. 83, Ont. 102, Ont. 108, Ont. 112, Ont. 119, Ont. 120, Ont. 157</p>

Record Series (Legal and Governance)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Internal Guidelines, Policies, Procedures, Memoranda and Directives</p> <p>Includes policy and procedure manuals, guidelines and directives, and all other policies and procedures established by the Board, departments and schools.</p>	<p>Originating</p>	<p>Life of Board + 5 years</p>	<p>Life of Board + 5 years</p>	<p>Ont. 81, Ont. 83, Ont. 108, Ont. 119, Ont. 120, Ont. 157</p>
<b>RISK MANAGEMENT</b>				
<p>Accident/Incident Claims and Reports</p> <p>Includes reports related to student, employee, volunteer, and visitor accidents that occur on board property, schools and the administration offices or on school trips.</p> <p>Records include claims, communications, investigations, reports, administration of first aid and action taken as a result of the accident.</p> <p>Includes reports to insurer.</p> <p>See also: LEG Accident/Incident Claims and Reports</p>	<p>Corporate Services</p>	<p>E + 3 years</p> <p>E = resolution of claim or report</p> <p>No further appeal +3 years for adults</p> <p><b>Note:</b> If student is under the age of 21, records must be kept until 21<sup>st</sup> birthday</p>	<p>Destroy</p>	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 34</p>

Record Series (Legal and Governance)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Appeals &amp; Hearings Includes records of hearings conducted with regard to issues that affect the school/board. Records include correspondence, reports, discover findings, hearing proceedings and final decisions. Examples: SEAC, IPRC, suspensions and expulsions, boundary reviews.</p>	<p>Corporate Services Director's Office</p>	<p>E = resolution of appeal or hearing No further appeal +3 years for adults <b>Note:</b> If the student is under the age of 21, records must be kept until 21<sup>st</sup> birthday</p>		<p>Ont. 1, Ont.2 , Ont. 4, Ont. 34</p>
<p>Insurance Policies Includes records relating to policies to cover loss or damage to property or premises and to cover staff and general public against injury or death resulting from accidents on school/board premises, or otherwise occurring during employment. Documentation regarding the annual review of insurance policies, certificates, appraisals, and related correspondence. For Accident Reports See: <a href="#">Accident/Incident Claims and Reports</a></p>	<p>Corporate Services</p>	<p>Life of Board + 5 years</p>	<p>Life of Board + 5 years</p>	<p>Ont. 34</p>
<p>Property Damage/ Trespassing Reports Includes reports and general correspondence regarding property damage, theft, or loss. Also includes vandalism reports, copies of repair invoices, monthly and annual summaries.</p>	<p>Originating Department</p>	<p>FY + 6 years</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4 Ont. 34, Ont. 223</p>



Record Series (Legal and Governance)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Legal Claims/ Litigation Includes all liability claims and litigation against or entered into by the boards/authorities and schools. Records include reports, correspondence, investigations, etc. For Accident Reports See: <a href="#">Employee Incident/Accident Reports</a> For WSIB/STD/LTD Claims See: <a href="#">Disability Management</a></p>	<p>Originating Department/ Legal</p>	<p>E + 3 years E = resolution of appeal or hearing. No further appeal +3 years for adults. <b>Note:</b> If student is under the age of 21, records must be kept until 21<sup>st</sup> birthday.</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4, Ont. 34</p>
<p>Legal Opinions/ Precedents Records include case law, correspondence, reports, and findings/opinions provided to requestor.</p>	<p>Originating Department Corporate Services</p>	<p>CCY + 10 years</p>	<p>Archival Review</p>	
<b>REAL PROPERTY MANAGEMENT</b>				
<p>Deeds &amp; Titles Includes original deeds to any board owned property.</p>	<p>Corporate Services</p>	<p>E = 10 years E = until Property Disposed</p>	<p>Destroy</p>	<p>Ont. 224</p>

Record Series (Legal and Governance)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Property Acquisition &amp; Sales Also includes plans, correspondence, reports and backup documentation relating to the acquisition or sale of lands. Includes land purchase agreements, development agreements, property appraisals, valuations and quotes concerning land owned by the board or under consideration for purchase.</p>	<p>Corporate Services</p>	<p>E = 10 years E = Until Property disposed</p>	<p>Destroy</p>	<p>Ont. 7, Ont. 224</p>

## Human Resources Management

**Description:** The function of managing all employees within the organization in accordance with policies and procedures. Records include but are not limited to personnel records, employee collective agreements, employee information (including medical information), conditions of work, overtime, salary rates, pensions, benefits, payroll records, grievances, performance evaluations and recruitment.

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
<b>COMPENSATION &amp; BENEFIT ADMINISTRATION</b>				
<p>Benefit Plans Includes records regarding benefits offered to employees such as group insurance, dental plans, wellness &amp; Employee Assistance Program (EAP). Includes brochures, rates, quotes, correspondence, explanatory documents, benefit rate changes &amp; premium adjustments. Excludes Benefit Records of Specific Employees.</p>	Human Resources	S/O + 1 year	Archival Review	
<p>Compensation Planning Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, salary surveys and schedules, salary increments, service pay and substitution pay. For Pay Equity Planning See: <a href="#">Pay Equity</a></p>	Human Resources	FY + 10 years	Destroy	

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Pay Equity Includes records regarding the establishment and implementation of the board's pay equity plan. Records include background information, consultant information, questionnaires, interview documentation and job evaluation plans.</p>	Human Resources	CCY + 5 years	Destroy	Ont. 132, Ont. 133, Ont. 134
<p>Pension Includes: Information and records relating to pension information, such as: Annual Information Returns; General Information on OMERS and other Annuities; Ontario Teachers' Pension Plan; Teacher's Pension Plan Certification; Pension reconciliation balances. Excludes – Individual Employee Information and Pension Contributions/Support.</p>	Human Resources	Life of Board + 5 years	Life of Board + 5 years	Ont. 136, Fed. 5, Fed. 30, Fed. 41

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
<b>HEALTH &amp; WELLNESS</b>				
<p>Disability Management Long term disability, short- and long-term illnesses, WSIB, attendance management, workplace accommodations. Includes medical records, doctor’s notes, correspondence, and health reports related to an employee’s medical situation. Includes information and records relating to employee’s illness or injuries that will assist the employee’s return to the workplace (WSIB).</p>	Human Resources	<p>Event + 40 years Event = Date first record created in personal exposure record And: Event + 20 years Event = Date last record added to personal exposure record <b>Note:</b> DO not store in the employee HR file.</p>	Destroy	<p>PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 36, Ont. 158, Ont. 159, Ont. 160, Ont. 161, Ont. 169, Fed. 22</p>
<p>Employee Incident/Accident Reports Includes reports of accident/injury to board employees under the Workplace Safety and Insurance Act and designated substances exposure records under the Occupational Health and Safety Act. Records may include: doctor’s notes, follow-up notes and related correspondence, and short-term and long-term disability claims for both teaching and support staff and record of administration of first aid.</p>	Human Resources	<p>Event + 40 years Event = Date first record created in personal exposure record And: Event + 20 years Event = Date last record added to personal exposure record</p>	Destroy	<p>PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 34, Ont. 217, Ont. 219</p>

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Medical Records: Hazardous Materials Exposure</p> <p>Records of staff exposure to asbestos and other hazardous materials.</p>	<p>Human Resources</p>	<p>Event + 40 years</p> <p>Event = Date first record created in personal exposure record</p> <p>And:</p> <p>Event + 20 years</p> <p>Event = Date last record added to personal exposure record</p>	<p>Destroy</p>	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 36, Ont. 158, Ont. 159, Ont. 160, Ont. 161, Ont. 169, Fed. 22</p>
<p><b>LABOUR/EMPLOYEE RELATIONS</b></p>				
<p>Equity Issues</p> <p>Includes information and records relating to all equity issues such as gender; questionnaires and plans; race relations; and strategies.</p> <p>For Pay Equity See: <a href="#">Pay Equity</a></p> <p>For Harassment Incidents See: <a href="#">Respect in the Workplace</a></p>	<p>Human Resources</p>	<p>CCY + 10 years</p>	<p>Destroy</p>	
<p>Grievances</p> <p>Includes records regarding grievances filed by employees such as evaluation reports, notifications, correspondence with union concerning grievance initiators &amp; legal opinions.</p> <p>Includes arbitrations.</p>	<p>Human Resources</p>	<p>E + 15 years</p>	<p>Destroy</p>	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 35, Ont. 132, Ont. 133</p>

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Harassment Complaints, Allegations and Investigations (Respect in the Workplace)</p> <p>Harassment includes acts of violence and vexatious comments or conduct against a worker in a workplace because of sex, sexual orientation, gender identity or gender expression, where the course of comment or conduct is known or ought reasonably to be known to be unwelcome. Includes records of incidents involving staff and students, incident reports, investigations, and correspondence regarding these issues.</p>	Human Resources	Life of Board + 5 years	Life of Board + 5 years	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 132, Ont. 133, Ont. 221, Fed. 9, Fed. 10, Fed. 11, Fed. 12, Fed. 13
<p>Labour Certification</p> <p>Includes original documents concerning the certification of labour unions.</p>	Human Resources	Life of Board + 5 years	Life of Board + 5 years	
<p>Labour Relations &amp; Negotiations, Union/NonUnion</p> <p>Includes records related to collective bargaining, e.g. final offers, memoranda of settlement, mediations, arbitrations and data used in preparation for bargaining.</p> <p>For Collective Agreements See: <a href="#">Union Collective Agreement/ Non-Union Terms &amp; Conditions Administration</a></p>	Human Resources	Life of Board + 5 years	Life of Board + 5 years	

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Union Collective Agreement/ Non-Union Terms &amp; Conditions Administration</p> <p>Includes records regarding the actual administration and interpretation of the board’s collective agreements, including seniority lists, implementation plans, sub plans, and related records. Excludes Grievances, Collective Agreements, Certification Documents &amp; Negotiations.</p>	Human Resources	Life of Board + 5 years	Life of Board + 5 years	



<b>Record Series (Human Resources Management)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/Comments</b>
<b>ORGANIZATIONAL PLANNING</b>				
Human Resources Planning Includes records of succession planning & retirement programs such as Early Retirement Incentive Program, staff turnover, staff mobility and related records.	Human Resources	CY + 3 years	Archival Review	
Staffing Includes all report listings concerning staff, e.g. staff allocation, staff transfers, staff directories, seniority lists, retirement lists and lists of occasional staff.	Human Resources	E + 1 year E = when new lists are received	Archival Review	PIB Ont. 1, Ont. 2, Ont. 4
Temporary Resourcing Includes information and records relating to temporary employees of the Board, such as: Requests for Temporary Assistance; Student or Practice Teachers' Records.	Human Resources	E + 1 year E = conclusion of placement	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 107, Ont. 117
Organization Structure Includes records relating to reporting relationships, organization structure, organization analysis, etc.	Director's Office	S/O + 1 year	Archival Review	
<b>RECRUITING &amp; SELECTING</b>				
Recruitment Includes records regarding the recruitment of staff, job postings, applications, resumes and applicant evaluations. Successful applicants are moved to the Employee File.	Human Resources	E + 1 year E = closing date of posting	Destroy	PIB Ont. 1, Ont. 2, Ont. 4

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
<b>STAFF MANAGEMENT</b>				
Attendance – Employee Includes records regarding employee attendance, absences (leaves, sabbaticals, special leaves, teacher exchanges, deferred salary) and vacations.	Human Resources	CY + 5 years	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 207
Criminal Background Checks Includes records listing any criminal code convictions that have not been pardoned for all existing and new employees, service providers and volunteers that come into direct contact with students on a regular basis.	Human Resources	E + 10 years E = Termination of employment/volunteer service	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 56
Criminal Offence Declarations Annual offence declarations, signed by the employee/service provider, which lists all criminal code convictions registered since the date of the last offence declaration.	Human Resources	E + 10 years E = Termination of employment/volunteer service	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 56
Employee Performance Appraisals Includes records of job performance appraisals on all employees according to established timelines and criteria through board procedures.	Human Resources	E + 10 years Event + to years (Event = Summative reports of performance appraisals to which records relate) To be filed in the Employee File.	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont.57, Ont. 79, Ont. 80, Ont. 84, Ont. 85, Ont. 88, Ont. 89, Ont. 90, Ont. 91, Ont. 94, Ont. 95, Ont. 96, Ont. 97

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Employee Records Includes only those records that relate to a board employee that a principal/supervisor “needs to know” in order to administer their supervisory responsibilities.</p>	<p>Human Resources <b>Note:</b> When an employee is transferred to another school/ workplace within the Board, or the employee is terminated or retired, the file shall be sent to HR Dept. HR staff will inspect the file to ensure that “only information considered essential for a Supervisor to perform the functions of his/her position” remains in the file. After reviewing the file, it will be forwarded to the new school/site.</p>	<p>E + 10 years E = termination or retirement</p>	<p>Forward to HR on termination</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4, Ont. 207, Ont. 209</p>
<b>TRAINING &amp; SKILLS DEVELOPMENT</b>				
<p>Professional Development Programs and Materials Includes records regarding courses and conferences facilitated by the board for staff development and information on career and professional development programs. Also includes conference proceedings and presentations, orientation materials and staff development calendars.</p>	<p>Originating Department</p>	<p>CY + 3 years</p>	<p>Archival Review</p>	

## Planning and Research

**Description:** The function of undertaking research and planning to support the ongoing operations of the school and board. Records include but are not limited to research surveys, studies and reports which address issues such as school boundaries, student demographics, municipal planning and statistics used to support Ministry funding requests.

<b>Record Series (Planning and Research)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/Comments</b>
<b>RESEARCH DESIGN &amp; PLANNING</b>				
Enrolment Includes all counts and projections, including the Official Projected Enrolment, documenting enrolments in the school system.	Research		Archival Review	Ont. 114, Ont. 225
Strategic Planning Includes all strategic and operational documents, mandates, as well as related correspondence, background and reference information. Management plans, School Improvement Planning, Business Budget Planning, and Integrated System Plan.	Research & Director's Office	CY + 10 years	Destroy	
School Boundaries Includes information relevant to the establishment of school boundaries for purposes of enrolment and facility use, including boundary descriptions, school attendance areas, and maps.	Planning	Life of Board + 5 years	Life of Board + 5 years	Ont. 47

Record Series (Planning and Research)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Student Demographics Includes aggregate reports profiling the characteristics of the student population, such as age, grade, promotion, country of birth, religion, and other trend data.</p>	<p>Research &amp; Planning</p>	<p>CY + 10 years</p>	<p>Destroy</p>	
<p>Municipal Planning and Development Includes records regarding planning and development issues within the Municipality that may have implications on enrolments within the school system. General information and documentation regarding other municipal planning and development issues such as sewage and waste management, property acreages, subdivision plans, official plan amendments, zoning changes, Ontario Population Reports and traffic studies.</p>	<p>Planning</p>	<p>CY + 4 years</p>	<p>Destroy</p>	
<p>Accommodations Planning Includes records regarding the allocation of classroom and work space assignment to all staff and students. Includes planning of the effects of enrolment on accommodations, projected use of facilities and space utilization, the planning of the functional space and number of classrooms and the planning of the physical layout of the space.</p>	<p>Planning</p>	<p>CY + 10 years</p>	<p>Destroy</p>	<p>Ont. 55</p>

Record Series (Planning and Research)	Accountability	Total Retention	Disposition	Citations/Comments
<b>RESEARCH &amp; OUTCOMES REPORTING</b>				
<p>Research Includes surveys, questionnaires and research dealing with a variety of topics such as Community and Parent research, Student research, Staff research, Curriculum &amp; Program research, Student research and External research from external sources such as other institutions and graduate students.</p>	Research	<p>CY + 10 years</p> <p>Note: Research applications not approved – 1 year after last use</p>	Archival Review	Ont. 4
<p>Ministry Reports Includes statistical reports, September school reports, June Board reports or other reports required by or send to the Ministry of Education as part of the funding or process for the preparation of educational statistics.</p>	Research & Director’s Office	CY/FY + 10 years	Destroy	Ont. 58, Ont. 114

## Program Design and Development

**Description:** The function of applying curriculum guidelines and designing education programs for students. Records include but are not limited to proposals, correspondence, lesson plans, and course outlines.

Record Series (Program Design and Development)	Accountability	Total Retention	Disposition	Citations/Comments
<b>CURRICULUM DESIGN &amp; PLANNING</b>				
<p>Program/Curriculum Guidelines</p> <p>Includes records regarding the planning and implementation of curriculum programs, program outlines, program reviews, curriculum guidelines and directives specifying curriculum and areas of study or courses of study that shall be taught in schools.</p> <p>Also includes procedures for the selection, approval, purchase, and distribution of school textbooks, learning materials, reference and library books and lists of these materials and books.</p>	Program Services	S/O + 3 years S/O = last update	Destroy	Ont. 45
<p>Courses of Study/Outlines</p> <p>Includes outlines of available programs including courses of study.</p>	Program Services	S/O + 3 years S/O = last update	Archival Review	Ont. 45

<p>Curriculum Projects, Programs, Planning, Proposals, and Review</p> <p>Includes recorded information regarding proposals for new curriculum programs, either system-wide or at the school level; comparisons with programs in other school board, provinces, and countries; the planning of the overall curriculum or specific programs, such as meeting notes, objective, strategy reports and teaching strategies; program review reports and other evaluations of specific programs in the curriculum; and proposals, correspondence and monitoring of projects for the writing of special curriculum materials. Includes EQAO test results for schools/boards.</p>	<p>Program Services</p>	<p>S/O + 3 years S/O = last Ministry review or audit</p>	<p>Archival Review</p>	<p>Ont. 45</p>
<p><b>PROGRAMS DESIGN &amp; PLANNING</b></p>				
<p>Program Development and Design</p> <p>Includes proposals, correspondence and curriculum development materials including writing projects, teaching units, lesson plans, blank examinations, testing ideas, songs, games, music sheets and other learning materials.</p>	<p>Program Services</p>	<p>S/O + 3 years S/O = last update</p>	<p>Destroy</p>	<p>Ont. 45</p>



Record Series (Program Design and Development)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Programs: Continuing Education</p> <p>Includes objectives, lesson units, principal reports, program reviews, teaching materials and related records used in continuing education programs for credit and also heritage awareness, second language, multicultural, seniors programs.</p>	<p>Continuing Education</p>	<p>S/O + 3 years S/O = last update</p>	<p>Destroy</p>	<p>Ont. 45</p>
<p>Programs and Services: Community</p> <p>Records related to programs and services to the community through school and board/authority facilities. Programs include general interest courses and services to the community. Generally refers to programs that are not part of dayschool.</p>	<p>Program Services</p>	<p>CY + 3 years S/O = last update</p>	<p>Destroy</p>	

## Safe and Caring Schools (Student Services)

**Description:** The function of providing students with programs and services in accordance with the Education Act. Records cover such areas as admissions, transfers and withdrawals, Ontario Student Records, guidance and counselling, assessments, consent/ permission forms for special activities and programs, and extra-curriculum programs and participation. Records include but are not limited to student marks, program participation records, examination and testing records, and counselling records.

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
<b>STUDENT ADMISSION/ REGISTRATION/ENROLMENT</b>				
<p>Student Registration and Verification Forms</p> <p>Registration forms, data verification forms, applications for school entry or special programs such as French Immersion.</p> <p>Also may include “Release Form for use of student personal information.”</p>	Schools	CY + 2 years	<p>Destroy</p> <p>Subject to Ministry of Education Audit</p> <p><a href="http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec">http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec</a></p>	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 114, Ont. 225</p>
<p>International Students – Admission, Enrolment and Registration</p> <p>Registration forms, applications for school entry, assessment information, admissions letters, visa information, guardian information (if available), immigration information, health information. Represents fee-paying and non-fee paying international students.</p>	Responsible Board-level staff	CY/FY + 6 years	<p>Destroy</p> <p>Subject to Ministry of Education Audit</p> <p><a href="http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec">http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec</a></p>	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 64, Ont. 114, Ont. 225</p>

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Transfers, Admittances and Retirement</p> <p>Includes registers and reports concerning the enrolment/ attendance of students, recording of daily attendance, and daily absence reports. Intent to be absent forms, supporting absence documentation. Also includes class registers for non-school system programs such as continuing education, driver education and heritage language programs.</p>	Schools	CY + 2 years	<p>Destroy</p> <p>Subject to Ministry of Education Audit</p> <p><a href="http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec">http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec</a></p>	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 64, Ont. 114, Ont. 225</p>
<p>Attendance &amp; Enrolment Registers: Student</p> <p>Includes registers and reports concerning the enrolment/ attendance of students, recording of daily attendance, and daily absence reports. Intent to be absent forms, supporting absence documentation. Also includes class registers for non-school system programs such as continuing education, driver education and heritage language programs.</p>	Schools	CY + 2 years	<p>Destroy</p> <p>Subject to Ministry of Education Audit</p> <p><a href="http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec">http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec</a></p>	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 64, Ont. 114, Ont. 225</p>

<b>STUDENT SUPPORT &amp; WELLNESS</b>				
<p>Attendance Counselling</p> <p>Records for students who are referred for counselling on attendance problems. Includes referral, consents, meeting notes and a summary. Also includes Supervised Alternative Learning (SAL) records.</p>	Attendance Counsellor/ Social Worker	E + 10 years E = Student's 21 <sup>st</sup> birthday	Destroy	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4</p>

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Career Counselling/Guidance Services</p> <p>Includes information concerning career counselling and guidance services. Also includes records of individual students who are referred for career assessment and guidance such as results of vocational interest tests and exercises, counselling records, interview notes, etc.</p>	School	CY + 1 year	Destroy	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4</p>
<p>Guidance Materials</p> <p>Includes brochures, calendars, description sheets and catalogues relating to career opportunities, external school programs, postsecondary education, private schools, and scholarships to support students.</p>	School	S/O	Destroy	
<p>Student Portfolio Individual Pathways Plan (IPP)</p> <p>IPP becomes the primary planning tool that students use as they proceed through school towards their initial postsecondary destination. Ongoing development of the IPP provides students a valuable archive of their learning and a catalogue of the resources they need for planning.</p>	School	<p>E + 5 years</p> <p>E = retirement from school</p>	Destroy	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 41, Ont. 55</p>

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Child and Youth Counsellors/ Workers Records, correspondence and information relating to individual students who are referred for counselling/ behaviour management, such as referral forms, consent forms, notes.</p>	<p>School/Special Services Department</p>	<p>E + 10 years E = case closed</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4</p>
<p>Student Welfare Information and records relating to correspondence and confidential reports regarding individual students where there is suspicion of child abuse, neglect or family violence. Student referral/action form for suspicion of child abuse to child protection agency.</p>	<p>School</p>	<p>E + 1 year E = case resolved</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4</p>
<p>Medical Home Instruction Home instruction is a shortterm intervention for students who are unable to attend school for medical or behavioural reasons. Excludes timesheets for teachers.</p>	<p>School</p>	<p>E + 1 year E = end of home instruction period</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4</p>
<p>Social Work Includes records of individual students who are referred for social worker services, such as referral forms, statistical forms, confidential notes from interviews and correspondence with third parties.</p>	<p>School/Special Services Department</p>	<p>E + 10 years OR If the client was less than 18 years at the time of his/her last relevant clinical contact, 10 years following the day the client became or would be 18 years of age.</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4, Ont. 228</p>

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
<b>STUDENT ASSESSMENT &amp; PROGRESS</b>				
<p>Individual Education Plans (IEP)</p> <p>An IEP is a written plan (hard copy and electronic) describing the special education program and/or services required by a particular student. It identifies learning expectations that are modified from or alternative to the expectations given in the curriculum policy document for the appropriate grade and subject or course, and/or any accommodations and special education services needed to assist the student in achieving his or her learning expectations. A signed hard copy of the IEP is retained in the student’s OSR until superseded.</p>	School	S/O + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 53
<p>Student Exams/Province-Wide Tests</p> <p>Includes records regarding student exams and/or province-wide testing. Records include correspondence, exam day schedules, exam day attendance and originals of completed student examinations, and master copies of blank exams. Also includes OSSLC (Literacy Course) student portfolio.</p>	School	CY + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Newcomer Student Assessments</p> <p>Includes assessments of individual newcomer students to determine their language background, immigration status, educational history, test results and recommendations for level placement and subjects.</p>	<p>School</p>	<p>E + 5 years E = retirement from school</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41</p>
<p>Speech &amp; Language Student Services</p> <p>Includes records of individual students who are referred to language/speech services, such as assessments, referral forms, test results, recommendations and programming suggestions.</p>	<p>Special Services/ School</p>	<p>E + 10 years E = when no longer receiving services</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 330</p>
<p>Psychological Services Records</p> <p>Includes professional records and information relating to individual students who are referred for psychological assessments, such as consultation and clinical notes, testing protocols, consents, referral forms, correspondence. May include third party reports.</p>	<p>Student (Special Education) Services</p>	<p>E + 10 years E = when no longer receiving services</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4</p>
<p>Specialized Equipment Needs</p> <p>Professional consultation records of individual students who are referred for placement in special education, classes and programs such as applications for admission, physical disability, and blind/low vision recorded information. May be subdivided by project/program/case file.</p>	<p>Special Education/ School</p>	<p>E + 5 years E = retirement from school</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 41</p>

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Student Health</p> <p>Includes medical and health information regarding students required for the care and treatment of students in the school setting.</p> <p>Includes pediculosis, medical emergency plans - Plan of Care, administration of medication plans, referral for care and other health related materials.</p>	School	S/O	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4
<b>STUDENT RECORDS ADMINISTRATION</b>				
<p>Ontario Student Record (OSR) – Active</p> <p>Includes all content prescribed according to the Ministry of Education OSR Guidelines, board processes, and at the discretion of the principal.</p> <p>The following components of the OSR will be retained for five years after a student retires from school:</p> <ul style="list-style-type: none"> <li>• Report cards</li> <li>• The documentation file, where applicable</li> <li>• Record of accumulated instruction in French/Indigenous as a second language</li> <li>• Additional information that is identified by the school board as appropriate for retention</li> </ul> <p>For OSR Components requiring 55-Year Postretirement Retention                      See: <a href="#">Ontario Student Record - Inactive</a></p>	School	E + 5 years E = retirement from Ontario school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41



Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Office Index Card</p> <p>Includes all office index cards containing personal information, as well as retirement/transfer information on individual students, which is available for immediate access and as OSR backup information.</p>	<p>School</p>	<p>E + 55 years</p> <p>E = At retirement, final office index card for each school attended is retained for 55 years</p>	<p>Destroy</p>	
<p>Ontario Student Record (OSR) - Inactive</p> <p>Transcript or elementary final student report card and elementary record of instruction in French/Indigenous as a second language, if applicable. Inactive records are retained in accordance with board processes. (See Also – <a href="#">Office Index Card</a>)</p>	<p>Schools Records Department</p>	<p>E + 55 years</p> <p>E = retirement from Ontario school</p>	<p>Destroy</p>	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 42</p>
<p>OSR Transfer Requests</p> <p>Requests received from other schools or school boards for Ontario Student Record.</p>	<p>Schools</p>	<p>CY + 2 years</p>	<p>Destroy</p> <p>Subject to Ministry of Education Audit</p> <p><a href="http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec">http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec</a></p>	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 114, Ont. 225</p>

<p>Co-operative Education Student Records</p> <p>Includes records of individual students participating in cooperative education work assignments, such as copies of work education agreements, introductions cards for employer interviews, training plans and applications for programs.</p>	<p>Learning Services</p>	<p>E + 5 years E = retirement from school</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41</p>
<p>Community Involvement Activities Form 40 Hours</p> <p>Document to support the completion of the required secondary school community service hours completed by students.</p>	<p>Schools</p>	<p>E + 5 years E = retirement from school</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41</p>
<p>Continuing Education Student Records</p> <p>Includes mature student appraisals, marks and other student-centered records for continuing education courses. Includes Certificate of Program Completion, and Prior Learning Assessment (PLA).</p>	<p>Schools</p>	<p>E + 55 years E = retirement from school</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4, Ont. 42</p>
<p>Notice of Intent for Home Schooling</p> <p>Signed form indicating a student will be withdrawn to be home-schooled.</p>	<p>School</p>	<p>CY + 2 years</p>	<p>Destroy</p> <p>Subject to Ministry of Education Audit</p> <p><a href="http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec">http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec</a></p>	<p>PIB Ont. 1, Ont. 2, Ont. 4, Ont. 114, Ont. 225</p>

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Timetables</p> <p>Includes course timetables for students, as well as course selection sheets for each semester.</p> <p>Also includes signed and dated forms authorizing students to add or withdraw from courses.</p> <p>Excludes School Course Calendars.</p>	Schools	CY + 2 years	Destroy  Subject to Ministry of Education Audit  <a href="http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec">http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec</a>	PIB  Ont. 1, Ont. 2, Ont. 4, Ont. 114, Ont. 225
<p>Supervised Alternative Learning (SAL) Records</p> <p>Includes records of individual students who make application to a SAL program.</p>	Student Services/School	E + 5 years E = retirement from the school	Destroy	PIB  Ont. 1, Ont. 2, Ont. 4, Ont. 41, Ont. 226
<p>Student Marks</p> <p>Records relating to student marks (computer and/or manual registers) and related promotion meetings data, such as: course marks analysis, credits received, information of students' courses completed (including special education) and marks received.</p>	School	E + 5 years E = retirement from the school	Destroy	PIB  Ont. 1, Ont. 2, Ont. 4, Ont. 41
<p>OYAP Participant Application Form</p> <p>Form for co-op students whose placement is within an apprenticeship trade.</p>	Learning Services	E + 5 years E = retirement from the school	Destroy	PIB  Ont. 1, Ont. 2, Ont. 4, Ont. 41

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Experiential Learning Student Records</p> <p>Includes records of individual students participating in experiential learning work assignments, such as introduction cards, work portfolio, and evaluation forms for employer interviews, training plans and application for programs, student evaluation forms.</p> <p>SHSM Programs.</p> <p>Excludes: Experiential Learning Programs, Work Education Agreements.</p>	<p>School</p>	<p>E + 5 years</p> <p>E = retirement from the school</p>	<p>Destroy</p>	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 41</p>
<b>STUDENT DISCIPLINE</b>				
<p>Expulsions</p> <p>Safe School Incident Reporting Form Part 1, related documentation, and any correspondence, if relevant to the expulsion of a student. Filed in the OSR.</p>	<p>Schools</p>	<p>CY + 1</p> <p>E + 5 years if expulsion is a result of a violent incident as defined in PPM 120</p> <p>E = Date of Expulsion Report</p>	<p>Destroy</p>	<p>PIB</p> <p>Ont. 1, Ont. 2, Ont. 4, Ont. 227</p>

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
<p>Suspensions Safe School Incident Reporting Form Part 1, related documentation and any correspondence, if relevant to the suspension of a student. Filed in the OSR.</p>	<p>Schools</p>	<p>CY + 1 E + 3 years if suspension is a result of a violent incident as defined in PPM 120 E = Date of suspension report</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4, Ont. 227, Ont. 333</p>
<p>Incidents Not Resulting in a Suspension or Expulsion Safe School Incident Reporting Form Part 1, related documentation, and any correspondence. Filed in the OSR.</p>	<p>Schools</p>	<p>E + 1 years if a violent incident as defined in PPM 120 E = Date of incident report If not a violent incident, no retention required at principal's discretion.</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4, Ont. 227, Ont. 333</p>
<p>Threat Assessment Process Documentation Includes Follow-up Intervention Plan (filed with safe schools department or Board equivalent), Case Conference Form (filed in the OSR).</p>	<p>Schools Safe Schools Department or Board Equivalent</p>	<p>CY + 1 year May be retained longer at principal's discretion.</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4, Ont. 110, Ont. 111, Ont. 112</p>

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
<b>STUDENT ACTIVITIES &amp; PROGRAMS</b>				
Nutrition Records relating to nutrition including milk programs, breakfast programs and litter less lunch programs, etc.	Schools	CY + 1 year	Destroy	
Transportation: Student Bus Services Includes school-based records concerning transportation/ busing for transportation of students to and from schools, field trips, and special programs. Records include bus schedules, requests for transportation, bus routes, boundaries and student lists.	Schools	CY + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
School Course Calendars Includes outlines of available programs and courses of study.	Schools	CY + 2 years	Archival Review Subject to Ministry of Education Audit <a href="http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec">http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec</a>	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 114, Ont. 225
Student Exchanges Includes correspondence, plans, schedules and reports relating to the student(s) involved in the exchange.	Schools	CY + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4

<b>Record Series (Student Services)</b>	<b>Accountability</b>	<b>Total Retention</b>	<b>Disposition</b>	<b>Citations/Comments</b>
<p>Student Extra-Curricular/Co-Curricular Activities</p> <p>Records and information that pertain to student activities that are part of school life such as field trips, school dances, extra-curricular activities, student exchanges, competition, related correspondence, plans, schedules. Includes requests, consent forms, school field trips, concerts, festivals, track meets, tournaments, facility tours, art or essay contests and science fairs.</p>	<p>School</p>	<p>CY + 1 year</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4</p>
<p>Scholarships, Bursaries &amp; Awards – Non-monetary</p> <p>Record regarding names of awards, information on awards, such as engraving, selections criteria, candidate nominations and recommendations, names of candidates, and related records that document the selection process of awards and scholarships.</p> <p>Also includes Ontario Scholar lists. See Also: <a href="#">Financial Management: Scholarship Funds, Bequests &amp; Donations</a></p>	<p>Secondary Schools</p>	<p>CY + 1 year</p>	<p>Archival Review</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4</p>
<p>Volunteer Programs</p> <p>Information and records of volunteer programs. Includes Annual Receptions, After School Programs, Child Video Identification Program – Recruitment Workshops, Volunteer Activities in Schools, Volunteer’s Signed Application Form, and Volunteers Assisting Teachers (VAT).</p>	<p>School or Site</p>	<p>S/O + 1 year</p>	<p>Destroy</p>	<p>PIB Ont. 1, Ont. 2, Ont. 4</p>

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
Extended Day Administration Current year information which includes program planning, participant information such as attendance, demographics, emergency contact information, confirmation of extended day funding, extended day binder report, extended day binders and vacation tracker	School	CY + 1 year	Destroy	

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# Ontario Citation Table

(for PDSB Generic Records Retention Schedule)

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 1	Access Requests – Format	General Regulation, under the <i>Municipal Freedom of Information and Protection of Privacy Act, RSO 1990, Reg 823, s. 11</i>	Not specified “shall be in written form”
Ont. 2	Extended Requests — Limitation Period	<i>Municipal Freedom of Information and Protection of Privacy Act, RSO 1990 Chapter M.56, ss. 17.(3) to (5)</i>	2 years
Ont. 3	Personal Health Information Custodians — Records Retention	<i>Personal Health Information Protection Act, 2004, SO 2004, Chapter 3 s. 13.(2)</i>	Event = Retain for as long as necessary to allow individual to exhaust any recourse under Act
Ont. 4	Personal Information Retained by Institutions	General Regulation under the <i>Municipal Freedom of Information and Protection of Privacy Act, RRO 1990, Reg 823, s. 5</i>	s. 5. An institution that uses personal information shall retain it for the shorter of one year after use or the period set out in a by-law or resolution made by the institution or made by another institution affecting the institution, except if, (a) the individual to whom the information relates consents to its earlier disposal; or (b) the information is credit or debit card payment data.

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 5	Persons or Organizations to whom Accessibility Standard Applies — Accessibility Reports	<i>Accessibility for Ontarians with Disabilities Act, 2005, SO 2005 Chapter 11, ss. 14.(1) to (4), 17.</i>	Keep to make available to the public on request s. 14 addresses obligations to have accessibility reports s. 17 at the request of a director, a person or organization shall provide the director with reports relating to compliance
Ont. 6	Electronic Commerce Act	<i>Electronic Commerce Act, 2000, SO 2000, Chapter 17, s. 12, s. 31(1)</i>	12. (1) A legal requirement to retain a document that is originally created, sent or received in written form is satisfied by the retention of an electronic document if (a) the electronic document is retained in the same format or in a format that accurately represents the information; and (b) the information in the electronic document will be accessible so as to be usable for subsequent reference  12.(2) A legal requirement to retain a document that is originally created, sent or received electronically is satisfied by the retention of an electronic document if, (a) the electronic document is retained in the same format, or in a format that accurately represents the information; (b) the information will be accessible so as to be usable for subsequent reference; and (c) if any its origin and destination and the date and time when it was sent or

			<p>received was part of the record it must also be retained.</p> <p>s. 31(1) The Act does not apply to the following documents:</p> <p>4. Documents, including agreements of purchase and sale that create or transfer interests in land and require registration to be effective against third parties.</p> <p>5. Negotiable instruments.</p> <p>6. Documents that are prescribed or belong to a prescribed class.</p> <p>(2) Except for section 23 (contracts for carriage of goods), this Act does not apply to documents of title.</p> <p>Documents that create or transfer interests in land and require registration to be effective against third parties must be kept in their original form.</p>
Ont. 7	Land Transfer Tax Act— Documents, Records and Accounts	<i>Land Transfer Tax Act, RSO 1990 Chapter L.6, s. 9.3.</i>	<p>Event + 7 years</p> <p>Event = date conveyance registered or information given to Minister unless written permission for earlier disposal received from Minister; at principal place of business in Ontario</p>
Ont. 8	Constructors — Posting and Retention of Construction Notification Form	Construction Projects Regulation, under <i>The Occupational Health and Safety Act, O.Reg 213/91, ss. 6 (3),(6), 19</i>	<p>Event + 1 year</p> <p>Event = project finished</p>

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 9	Engineer's Safety Net Inspections/Tests Documentation	Construction Projects Regulation, under the <i>Occupational Health and Safety Act</i> , O.Reg 213/91, s. 19; ss. 26.8 (4),(5)	Event + 1 year Event = project finished  s. 26.8(4),(5) – a copy of inspection and testing of the safety net shall be kept at the project while safety net is in service
Ont. 10	Constructors — Lifeline System Designs	Construction Projects Regulation, under the <i>Occupational Health and Safety Act</i> , O.Reg 213/91, s. 26.9 (8) pars. 1, 6	Event = Keep design at project while system in use.
Ont. 11	Constructors — Record of Servicing, Cleaning and Sanitizing of Facilities and Facilities Location Change Documents	Construction Projects Regulation, under the <i>Occupational Health and Safety Act</i> , O.Reg 213/91, ss. 29 (9),(12)	Event = Keep for duration of project
Ont. 12	Workplace Accessibility Tax Incentive Certificates	<i>Corporations Tax Act, RSO 1990 Chapter C.40</i> , s. 13.3 (10)	Not specified "retains"
Ont. 13	Provincial Offence Tax Prosecutions — Limitation Period	<i>Income Tax Act, RSO 1990, Chapter I.2</i> , s. 48.(3).	Event + 8 years Event = day subject matter of information/complaint arose
Ont. 14	Income Tax Accounting Records and Books of Account	<i>Income Tax Act, RSO 1990, Chapter I.2</i> , s. 39	Event + 6 years Event = End of last taxation year to which records relate; at person's place of business or residence in Ontario; unless exceptions apply
Ont. 15	Constructors — Design Drawings / Specifications	Construction Projects Regulation, under the <i>Occupational Health and Safety Act</i> , O.Reg 213/91, ss. 19, 236(7).	Event + 1 year Event = project finished

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 16	Employer Health Tax Act Offence Prosecutions — Limitation Period	<i>Employer Health Tax Act, RSO 1990, Chapter E.11, s. 37.</i>	Event + 6 years Event = date on which offence was, or is alleged to have been committed
Ont. 17	Elevating Devices — Inspection and Tests Records Logbook	Elevating Devices Regulation, under the <i>Technical Standards and Safety Act, 2000</i> , O.Reg. 209/01, ss. 33(6),(7), 34.(2).	Event + 5 years Event = date of last entry
Ont. 18	Owner/Contractors — Elevating Device Log Books	Elevating Devices Regulation, under the <i>Technical Standards and Safety Act, 2000</i> , O.Reg. 209/01, s. 34.	Event + 5 years Event = date of last entry
Ont. 19	Owners — List of Emergency Contacts	Elevating Devices Regulation, under the <i>Technical Standards and Safety Act, 2000</i> , O.Reg. 209/01 s. 37.(e)	Keep to make available on request
Ont. 20	Owners — Elevating Device Registered Design Submissions/ Maintenance Instructions	Elevating Devices Regulation, under the <i>Technical Standards and Safety Act, 2000</i> , O.Reg. 209/01, ss. 25.(2), 37.(f),(g)	Keep to make available on request and transfer to new owners
Ont. 21	Employer Health Tax Refunds — Limitation Period	<i>Employer Health Tax Act, RSO 1990, Chapter E.11, s. 6.(1)(b).</i>	Event + 4 years Event = day return required to be delivered

Peel District School Board - Records Retention Schedule

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 22	Environmental Offence Prosecutions — Limitation Period	<i>Environmental Protection Act, R.S.O. 1990, c. E.19, s. 195.</i>	Event + 2 years Event = later of: date of offence and day evidence of offence first came to attention of person appointed under s. 5.
Ont. 23	Generator — Waste Disposal Records	General - Waste Management Regulation, under the <i>Environmental Protection Act, R.R.O. 1990, Reg. 347, ss. 18(8), (9).</i>	Minimum retention 2 years. s. 18 (9) A record referred to in subsection (8) may be disposed of after two years
Ont. 24	Employers — Employee Name and Address Records	<i>Employment Standards Act, 2000, SO 2000, Chapter 41, ss. 15.(1) par. 1, 15(5) par. 1; s. 16</i>	Event + 3 years Event = date employee ceased to be employed by employer
Ont. 25	Employers — Employee Records / Date of Birth	<i>Employment Standards Act, 2000, SO 2000, Chapter 41, ss. 15(1) par. 2, 15(5) par. 2; s. 16</i>	Event + 3 years Event = earliest of: employee's 18th birthday or date employee ceased to be employed by employer
Ont. 26	Employers — Employment Records / Date Employment Started	<i>Employment Standards Act, 2000, SO 2000, Chapter 41, ss. 15.(1) par. 3, 15.(5) par. 1; s. 16</i>	Event + 3 years Event = date employee ceased to be employed by employer
Ont. 27	Schedule 1 Employers — Wages Record	<i>Workplace Safety and Insurance Act, 1997, SO 1997, Chapter 16, Schedule A, s. 80</i>	Not specified

Peel District School Board - Records Retention Schedule

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 28	Accident and First Aid Records	First Aid Requirements Regulation, under the <i>Workplace Safety and Insurance Act, 1997, RRO 1990, Reg. 1101, s. 5.</i>	Not specified
Ont. 29	Offence Prosecutions — Limitation Period	<i>Workplace Safety and Insurance Act, 1997, SO 1997, Chapter 16, Schedule A, s. 157.1.(1)</i>	Event + 2 years Event = most recent act or omission upon which prosecution is based comes to knowledge of Board
Ont. 30	Fire Insurance Claims — Limitation Period	<i>Insurance Act, R.S.O. 1990, c. 1.8, s. 148(2), Stat. Cond. 14.</i>	s.14. Every action or proceeding against the insurer for the recovery of a claim under or by virtue of this contract is absolutely barred unless commenced within one year next after the loss or damage occurs.
Ont. 31	Record destruction indexes	CAN/CGSB-72.342017: Electronic Record as Documentary Evidence	Record of disposition actions shall be kept permanently as proof by the organization
Ont. 32	Municipal or other Government Emergency Plans	Emergency Management and Civil Protection Act, RSO 1990, Chapter E.9, s. 10	Keep to make available on request during ordinary business hours of municipality, ministry or branch of government
Ont. 33	Joint Health & Safety Committee — Minutes of Proceedings	<i>Occupational Health and Safety Act, R.S.O. 1990, c. O.1, s. 9(22).</i>	Not specified “shall maintain and keep”

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 34	Basic Limitation Period	Limitations Act, 2002, S.O. 2002, c. 24, Sch. B, s. 4.	Event + 2 years Event=Second anniversary of the day on which the claim was discovered.
Ont. 35	Ultimate Limitation Period	<i>Limitations Act, 2002, S. O. 2002, c. 24, Schedule B, ss. 15.(1),(2).</i>	Event + 15 years Event = act or omission on which claim is based took place NOTE: Allegation of sexual abuse should be retained Event +50
Ont. 36	Workers Compensation Prosecution Limitation	<i>Workplace Safety and Insurance Act, 1997, SO 1997, Chapter 16, Schedule A, s. 157.1.(1)</i>	Last Event +2 s. 157.1(1) A prosecution for an offence under this section shall not be commenced more than two years after the date on which the most recent act or omission upon which the prosecution is based came to the attention of the Board.
Ont. 37	WHMIS — Toxicological Data for Material Safety Sheets	Workplace Hazardous Materials Information System (WHMIS) Regulations, under the <i>Occupational Health and Safety Act, R. R. O. 1990, R. 860, s. 25</i>	Keep to provide on request
Ont. 38	Emissions and Verification Reports and Other Greenhouse Gas Emissions / Biomass Documentation / Data / Facility Information and Logs	Greenhouse Gas Emissions: Quantification, Reporting, and Verification O. R. 390/18, s. 24	Event + 7 years Event = End of reporting period to which relates



Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 39	Safety Data Sheets — Limitation/Expiry Period	<i>Occupational Health and Safety Act, RSO 1990, Chapter. O.1, ss. 37(1), 39</i>	Shall retain or prepare/make available
Ont. 40	WHMIS — Hazard Assessments and Worker Education Programs	Workplace Hazardous Materials Information System (WHMIS) Regulations, under the <i>Occupational Health and Safety Act, RRO 1990, Reg. 860, ss. 3.(1), 7</i>	Not specified “shall ensure developed/assess”
Ont. 41	Student Records- Ontario Student Record (OSR)	<i>Education Act, RSO. 1990, Chapter E.2, ss. 265(1)(d)</i> Ontario Student Record (OSR) Guideline, 2000 Ministry of Education <a href="http://edu.gov.on.ca/eng/document/curriculum/osr/osr.html#top">http://edu.gov.on.ca/eng/document/curriculum/osr/osr.html#top</a>	The following components of the OSR will be retained for 5 years after a student retires from school: <ul style="list-style-type: none"> <li>• report cards</li> <li>• the documentation file, where applicable</li> <li>• additional information that is identified by the school board as appropriate for retention</li> </ul>
Ont. 42	Student Records- Ontario Student Record (OSR)	<i>Education Act, RSO. 1990, Chapter E.2, ss. 265(1)(d)</i> Ontario Student Record (OSR) Guideline, 2000 Ministry of Education <a href="http://edu.gov.on.ca/eng/document/curriculum/osr/osr.html#top">http://edu.gov.on.ca/eng/document/curriculum/osr/osr.html#top</a>	The following components of the OSR will be retained for 55 years after a student retires from school: <ul style="list-style-type: none"> <li>• the OSR folder</li> <li>• the Ontario Student Transcripts (OST)</li> <li>• the office index card</li> </ul>

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 43	Obligated Organizations / Educational or Training Institutions — Accessible Student Records and Information	Integrated Accessibility Standards Regulation, under the <i>Accessibility for Ontarians with Disabilities Act, 2005</i> , O. Reg. 191/11, s. 15(1) par. 2	<p>Not specified “shall provide in accessible formats”</p> <p>Description:</p> <p>15.(1) Every obligated organization that is an educational or training institution shall do the following, if notification of need is given: . . .</p> <p>2. Provide student records and information on program requirements, availability and descriptions in an accessible format to persons with disabilities.</p>
Ont. 44	Board of Education Secretary — Meeting Minutes and Ministry Reports	<i>Education Act, RSO. 1990, Chapter E.2, ss. 198(1)(a), (b); 207(4)</i>	<p>Not specified “is responsible for keeping/keep to provide on request of Ministry”</p> <p>s.207(4) Any person may, at all reasonable hours, at head office of the board inspect the minute book, the audited annual financial report and current accounts of a board, and, upon the written request of any person and upon the pay to the board at the rate of 25 cents for every 100 works or at such lower rate as the board fix, the secretary shall furnish copies of them or extracts therefrom certified under the secretary’s hand.</p> <p>See also Ont. 47</p> <p>See also Ont. 65</p>

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 45	School Principals — Course Outlines	Operation of Schools — General Regulation, under the <i>Education Act, R.R.O. 1990, Reg. 298, ss. 11.(3)(c), (d)</i>	<p>Not specified “shall retain”</p> <p>Description:</p> <p>11.(3) In addition to the duties under the Act and those assigned by the board, the principal of a school shall, except where the principal has arranged otherwise under subsection 26.(3), . . .</p> <p>(c) retain on file up-to-date copies of outlines of all courses of study that are taught in the school;</p> <p>(d) upon request, make outlines of courses of study</p>
Ont. 46	Dissolved Boards of Education	<i>Education Act, R.S.O. 1990, c. E.2, s. 66.(4)</i>	Event = Shall be filed as Minister may direct

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 47	Board — Education Records Management / Archival Retention	<i>Education Act</i> , RSO. 1990, Chapter E.2, s. 171.(1), par. 38; 207(4)	Not specified “may establish schedules for destruction” 171.(1) A board may, . . . 38. institute a program of records management that will, subject to the regulations in respect of pupil records, i. provide for the archival retention by the board or the Archivist of Ontario of school registers, minute books of the board and its predecessors, documents pertaining to boundaries of school sections, separate school zones and secondary school districts, original assessment and taxation records in the possession of the board and other records considered by the board to have enduring value or to be of historical interest, and ii. establish, with the written approval of the auditor of the board, schedules for the retention, disposition and eventual destruction of records of the board and of the schools under its jurisdiction other than records retained for archival use. See also Ont. 44 and Ont. 65
Ont. 48	Professional Activity Day Evaluations	School Year Calendar, Professional Activity Days Regulation, under the <i>Education Act</i> , RRO 1990, Reg. 304, s. 8	Not specified “shall retain” Description: 8. In each year, every board shall undertake an annual evaluation of the activities of the professional activity days of the previous year and retain such evaluations on file.

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 49	Principals — Management of Pupil Records / Register of Pupils / Timetables and other Information	<i>Education Act, RSO. 1990, Chapter E.2, ss. 265(1) (c), (e), (i)</i>	<p>Not specified “duties to maintain/retain/dispose/register/prepare” Description:</p> <p>265.(1) It is the duty of a principal of a school, in addition to the principal’s duties as a teacher, . . .</p> <p>(c) to register the pupils and to ensure that the attendance of pupils for every school day is recorded either in the register supplied by the Minister in accordance with the instructions contained therein or in such other manner as is approved by the Minister;</p> <p>(e) to prepare a timetable, to conduct the school according to the timetable and relevant school year calendar, to make the timetable and calendar accessible to pupils, teachers, designated early childhood educators and supervisory officers, to assign classes and subjects to teachers and to assign junior kindergarten or kindergarten classes or extended day program units to designated early childhood educators;</p>

Peel District School Board - Records Retention Schedule

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 50	Schools for the Blind and the Deaf Superintendents — Pupil Records	Ontario Schools for the Blind and Deaf Regulation, under the <i>Education Act, R.R.O. 1990</i> , Reg. 296, s. 18.(f)	Not specified “shall maintain and retain”
Ont. 51	Principal — School Visitors Book	<i>Education Act, R.S.O. 1990</i> , c. E.2, s. 265.(1)(n)	Not specified “to maintain a visitor's book in the school when so determined by the board”
Ont. 52	Board — Special Education Plan	Special Education Programs and Services Regulation, under the <i>Education Act, R.R.O. 1990</i> , Reg. 306, ss. 2.(2), 6	Not specified “shall maintain/ensure is amended”
Ont. 53	Principal — Individual Education Plans	Identification and Placement of Exceptional Pupils Regulation, under the <i>Education Act</i> , O. Reg. 181/98, s. 8	See Ont. 41 OSR Guideline – IEP to be stored in the Documentation File
Ont. 54	School Councils — Meeting Minutes / Financial Transaction Records	School Councils and Parent Involvement Committees Regulation, under the <i>Education Act</i> , O. Reg. 612/00, s. 16 (1)	4 years
Ont. 55	Ministry — Plans for School Buildings	Operation of Schools — General Regulation, under the <i>Education Act, R.R.O. 1990</i> , Reg. 298, s. 2.(1)	Not specified “shall file”

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 56	Personal Criminal History	Collection of Personal Information, under the <i>Education Act</i> , O. Reg. 521/01, s. 2 <i>Police Record Checks Reform Act, 2015, S.O. 2015, c.30</i>	Retention not specified O. Reg. 521/01 s.2 “shall collect” Police Record Checks Reform Act, 2015 what may be collected
Ont. 57	Board — Performance Appraisal System Information	<i>Education Act, R.S.O. 1990, c. E.2, s. 277.45.(1)</i>	Keep to make available on request  277.45(1) Every board shall make information about the performance appraisal system set out in this Part available to, (a) teachers employed by the board; (b) pupils who are enrolled in schools of the board and their parents; (c) the chair of the school council for each school governed by the board.
Ont. 58	School Principals — Posting of Ministry Documents	Operation of Schools — General Regulation, under the <i>Education Act, RRO 1990, Reg. 298, ss. 11 (12), (13)</i>	Not specified
Ont. 59	Teachers — Teaching Plans and Outlines	Operation of Schools — General Regulation, under the <i>Education Act, R.R.O. 1990, Reg. 298, s. 20.(f)</i>	Keep to provide on request

Peel District School Board - Records Retention Schedule

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 60	Teachers — Reports Cards	Operation of Schools — General Regulation, under the <i>Education Act, RRO 1990, Reg. 298, s. 11</i>	See Ont. 41 OSR Guideline – Report Cards
Ont. 61	Supervisory Officers — Visit and Annual Reports	<i>Education Act, RSO. 1990, Chapter E.2, ss. 286.(1)(d), (f) to (h)</i>	Not specified “duty to prepare/make/furnish”
Ont. 62	Documents regarding Parental and Pupil Input into Teacher Evaluations	<i>Education Act, RSO. 1990, Chapter E.2, ss. 277.32(2) to (6)</i>	Not specified “recording”
Ont. 63	Board Secretary — Appeal Records for Education Development Charge By-law	<i>Education Act, RSO. 1990, Chapter E.2, ss. 257.66.(1), (2), 257.75.(1), (2)</i>	Not specified “shall compile”
Ont. 64	False Register Offence	<i>Education Act, RSO. 1990, Chapter E.2, ss. 213 (1)</i>	Not specified “keeps”
Ont. 65	Board Treasurers — Financial Statements	<i>Education Act, RSO. 1990, Chapter E.2, ss. 252.(1), (2), (3); 207(4)</i>	Not specified “shall keep/give to the Ministry/publish/mail See also Ont. 44 See also Ont. 47
Ont. 66	Secretary — Rural Separate School Authority & Combined Separate School Zones Supporter Elector Records	<i>Education Act, RSO. 1990, Chapter E.2, ss. 92(8), 94(2)</i>	Not specified “shall enter” See also Ont. 44
Ont. 67	Student Trustee Issues — Vote Records	<i>Education Act, RSO. 1990, Chapter E.2, s. 55.(3)</i>	Not specified “recorded vote”



Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 68	Ministry Access to Personal Information	<i>Education Act, RSO. 1990, Chapter E.2, s. 8.1</i>	<p>Indirect Collection of Personal Information by Ministry of Education</p> <p>8.1(1) The Minister may collect personal information, directly or indirectly, for purposes related to the following matters, and may use it for those purposes:</p> <ol style="list-style-type: none"> <li>1. Administering this Act and the regulations, and implementing the policies and guidelines made under this Act.</li> <li>2. Ensuring compliance with this Act, the regulations, and the policies and guidelines made under this Act.</li> <li>3. Planning or delivering programs or services that the Ministry provides or funds, in whole or in part, allocating resources to any of them, evaluating or monitoring any of them or detecting, monitoring and preventing fraud or any unauthorized receipt of services or benefits related to any of them.</li> </ol> <p>3.1 Planning or delivering extended day programs, allocating resources to them, evaluating or monitoring them or detecting, monitoring and preventing fraud or any unauthorized receipt of services or benefits related to them.</p>

<p>Ont 68 (cont'd)</p>			<p>3.2 Providing for financial assistance related to extended day programs, evaluating or monitoring the provision of the assistance or detecting, monitoring and preventing fraud or any unauthorized receipt of benefits related to the assistance.</p> <p>4. Risk management, error management or activities to improve or maintain the quality of the programs or services that the Ministry provides or funds, in whole or in part.</p> <p>4.1 Risk management, error management or activities to improve or maintain the quality of extended day programs.</p> <p>4.2 Risk management, error management or activities to improve or maintain the provision of financial assistance related to extended day programs.</p> <p>5. Research and statistical activities that relate to education and are conducted by or on behalf of the Ministry.</p>
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Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 69	Boards — Annual School Calendars and Professional Activity Day Agendas	School Year Calendar, Professional Activity Days Regulation, under the <i>Education Act, RRO 1990</i> , Reg. 304, s. 4.1(1), 7 (1)	Keep to make available on request at beginning of school years
Ont. 70	Schools for the Blind and the Deaf Teachers — Teaching Plans and Outlines	Ontario Schools for the Blind and Deaf Regulation, under the <i>Education Act, RRO 1990</i> , Reg. 296, s. 15.(d)	Not specified “shall prepare/keep to provide Superintendent on request”
Ont. 71	Boards — Exceptional Pupils Placement Guides	Ontario Schools for the Blind and Deaf Regulation, under the <i>Education Act, RRO 1990</i> , Reg. 296, s. 16.(d)	Not specified “shall record” Description: 16. A residence counsellor shall, . . . (d) record the growth and development of each pupil in the residence area;
Ont. 72	Boards — Exceptional Pupils Placement Guides	Identification and Placement of Exceptional Pupils Regulation, under the <i>Education Act</i> , O. Reg. 181/98, s. 13	Keep to provide parent on request at each school in the board’s jurisdiction and at board’s head office in various formats
Ont. 73	School Councils — Annual Report	School Councils and Parent Involvement Committees Regulation, under the <i>Education Act</i> , O. Reg. 612/00, s. 24	Keep to provide parents on request/shall submit/post

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 74	Special Education Funding Guidelines: Special Equipment Amount (SEA) and Special Incidence Portion (SIP) Grants for Student Needs Projections ) (updated annually	Grants for Student Needs — Legislative Grants for the 2018 – 2019 School Board Fiscal Year Regulations, under the <i>Education Act</i> , O. Reg. 284/18	Keep to make available on request
Ont. 75	Educational Institutions — Pupil Records / Ontario Education Number	Ontario Education Numbers Regulation, under the <i>Education Act</i> , O. Reg. 440/01, s. 4 par. 1	Not specified “maintained” 4. Educational institutions prescribed by section 1 shall use an individual’s Ontario education number to identify the individual in the following types of material: par. 1. All pupil records that are compiled and maintained in accordance with the Act or under any policy, guideline or directive issued by the Minister of Education relating to pupil records.
Ont. 76	Minister of Education Personal Information Collection	Ontario Education Numbers Regulation, under the <i>Education Act</i> , O. Reg. 440/01, s. 3	Indirect Collection of Personal Information by Ministry of Education 3. The Minister of Education and officials of the Ministry of Education may collect from an educational institution prescribed by section 1 or 1.1 the following personal information about an individual who is or was enrolled in an educational institution prescribed by section 1 or who seeks or sought to be enrolled in the institution: par.1. The individual’s full name, any name the individual prefers to use and any previous names the individual used. par. 2. The individual’s gender. par. 3. The individual’s date of birth.

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 78	Teachers' Learning Plans	Teacher Learning Plans Regulation, under the <i>Education Act</i> , O. Reg. 98/02, s. 2.(5)	Not specified "shall retain" 2.(5) The teacher and the appropriate principal shall each sign the teacher's learning plan for the year and each of them shall retain a copy.
Ont. 79	Boards — Performance Appraisal Records	Teacher Performance Appraisal Regulation, under the <i>Education Act</i> , O. Reg. 99/02, s. 9	Event + 6 years Event = Summative report to which record relates
Ont. 80	Boards — New Teacher Performance Appraisal Records	Teacher Performance Appraisal Regulation, under the <i>Education Act</i> , O. Reg. 99/02, s. 17	Event + 6 years Event = Summative report to which record relates
Ont. 81	Boards — Delegation Policies and Guidelines	<i>Education Act, RSO. 1990, Chapter E.2, s. 302.(9.1)</i>	Keep to make policies and guidelines available on request
Ont. 82	Boards — Securities Transaction Records	Board Borrowing, Investing and Other Financial Matters Regulation, under the <i>Education Act</i> , O. Reg. 41/10, ss. 14.(1), (2)(e)	See Fed.16 Books of Account FY+6 Not specified "shall include" 14.(1) If a board has an investment in a security prescribed under this Part, the board shall require the treasurer of the board to prepare an investment report as part of the treasurer's annual financial report to the board.

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 83	Boards — Statement of Board’s Investment Policies and Goals	Board Borrowing, Investing and Other Financial Matters Regulation, under the <i>Education Act</i> , O. Reg. 41/10, s. 13.(1)	Not specified “shall adopt”  13.(1) Before a board invests in a security prescribed under this Part, the board shall, if it has not already done so, adopt a statement of the board’s investment policies and goals.
Ont. 84	Principals and Vice Principals— Performance Plans Growth Plans Improvement Plans	Principal and Vice— Principal Performance Appraisal Regulation, under the <i>Education Act</i> , O. Reg. 234/10, ss. 3.(1), (6), 6(4), 7(6), 11(5), 12(6)(7), 24, 48, 50	Event + 6 years  Event = Summative reports of performance appraisals to which records relate
Ont. 89	Boards — Appraisal Info	Principal and Vice— Principal Performance Appraisal Regulation, under the <i>Education Act</i> , O. Reg. 234/10, s. 26	Keep to make available on request  26.(1) Every board shall make information about the performance appraisal system set out in this Part available to,  (a) supervisory officers, principals and vice-principals employed by the board; (b) teachers employed by the board; (c) pupils who are enrolled in schools of the board and their parents; and (d) the chair of the school council for each school governed by the board.

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 98	Audit Committees — Conflict of Interest Records / Minutes	Audit Committees Regulation, under the <i>Education Act</i> , O. Reg. 361/10, ss. 14(3),	See Fed.16 Books of Account FY+6  Not specified “shall be recorded”  14(3) If a member or his or her parent, child or spouse could derive any financial benefit relating to an item on the agenda for a meeting, the member shall declare the potential benefit at the start of the meeting and withdraw from the meeting during the discussion of the matter and shall not vote on the matter.
Ont. 99	Audit Committees — Audit Annual Reports	Audit Committees Regulation, under the <i>Education Act</i> , O. Reg. 361/10, ss. 9(7), 15	See Fed.16 Books of Account FY+6  Not specified “shall report /submit”
Ont. 100	Audit Committees — Minutes	Audit Committees Regulation, under the <i>Education Act</i> , O. Reg. 361/10, s. 11(7); s.207(4)	Not specified “shall ensure taken” See also Ont. 47
Ont. 101	Director of Education — School Councils Summary of Activities	School Councils and Parent Involvement Committees Regulation, under the <i>Education Act</i> , O. Reg. 612/00, s. 50.(3)	Not specified “shall provide/post” See Ont.102 Event = Shall retain in accordance with policies of board. Shall be available for examination at the board’s office and on the Board website for four years

Peel District School Board - Records Retention Schedule

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 102	Parent Involvement Committees — Minutes of Meetings and Financial Transactions Record	School Councils and Parent Involvement Committees Regulation, under the <i>Education Act</i> , O. Reg. 612/00, s. 44	Event = Shall retain in accordance with policies of board  Shall be available for examination at the board's office and on the Board website for four years
Ont. 103	Boards — Emergency Procedures	Extended Day and Third Party Programs Regulation, under the <i>Education Act</i> , O. Reg. 221/11, ss. 22(6), (7)	Keep to make available on request
Ont. 104	Boards — Annual Day Care and Third Party Program Reports	Extended Day and Third Party Programs Regulation, under the <i>Education Act</i> , O. Reg. 221/11, ss. 24(4), (5)	Not specified "shall submit"
Ont. 105	School Boards — Annual Reports of Elementary School Class Size	Class Size Regulation, under the <i>Education Act</i> , O. Reg. 132/12, s. 11	Not specified "shall submit/shall ensure kept at head office of board and at the office of each school of the board, and made available on request"
Ont. 106	School Board Annuals — Reports of Secondary School Class Size	Class Size Regulation, under the <i>Education Act</i> , O. Reg. 132/12, s. 15	Not specified "shall submit/keep to make available on request at head office of board / and school offices"
Ont. 107	Boards — Roster of Occasional Teachers / Long Term Teachers Lists	Hiring Practices Regulation, under the <i>Education Act</i> , O. Reg. 274/12, ss. 3, 4	Not specified "shall maintain/post on website"



Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 108	Boards — Climate Survey - Collection of Information	Education Act, R.S.O.1990, c. E.2, s. 169(2.1), (2.2); <i>Anti-Racism Act, S.O. 2017, c.15</i>	<p>Education Acts. 169.1(2.1) In fulfilling its duties under clause (1)(e) with respect to the effectiveness of policies developed by the board to promote the goals referred to in clauses (1)(a.1) and (a.2), every board shall use surveys to collect information from its pupils and staff, and parents and guardians of its pupils at least once every two years in accordance with any policies and guidelines made under paragraph 31 of subsection 8(1).(2.2) In collecting information under subsection (2.1), a board shall not collect any name or any identifying number, symbol or other particular assigned to a person</p> <p>Anti-Racism Acts.6 (1) The Minister, with the approval of the Lieutenant Governor in Council, shall establish data standards for the collection, use and management of information, including personal information, to identify and monitor systemic racism and racial disparities for the purpose of eliminating systemic racism and advancing racial equity.s.7(10)The public sector organization shall retain the collected personal information for the period specified in the applicable data standards or, if there is no such specified period, for at least one year after the day it was last used by the organization.</p>

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 109	Boards — Policy and Guideline Changes	<i>Education Act, R.S.O. 1990, c. E.2, s. 301(11)</i>	<p>Not specified “shall submit”</p> <p>Event = Shall retain in accordance with policies of board</p> <p>Minister may require boards to submit any policy or guideline established under section 302 to the Ministers and to implement changes to the policy or guideline as directed by the Minister.</p>
Ont. 110	Boards — Posting of Bullying Prevention and Intervention Plans	<i>Education Act, R.S.O. 1990, c. E.2, s. 303.3(4)</i>	<p>Not specified</p> <p>Event = Shall retain in accordance with policies of board</p>
Ont. 111	Principals — Posting of Bullying Prevention and Intervention Plans	<i>Education Act, R.S.O. 1990, c. E.2, s. 303.3(5)</i>	<p>Not specified</p> <p>303.3(5) A principal of a school shall make the board’s bullying prevention and intervention plan available to the public by posting it on the school’s website or, if the school does not have a website, in another manner that the principal considers appropriate.</p>
Ont. 112	Boards — Suspension and Expulsion Reports	<i>Education Act, R.S.O. 1990, c. E.2, s. 314.5(1)</i>	<p>Not specified “shall submit”</p> <p>314.5(1) Every board shall submit annual reports to the Minister, in accordance with the policies or guidelines under subsection 301(7.3), respecting suspensions and expulsions</p>

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 114	Ministry of Education — “Ontario Schools, Kindergarten to Grade 12: Policy and Program Requirements, 2016”	<i>Education Act</i> : Calculation Of Average Daily Enrolment For The 2014-2015 School Board Fiscal Year Regulation, under the <i>Education Act</i> , O. Reg. 75/14, s. 2	Keep to make available on request at offices of Education Finance Branch of Ministry of Education / on website
Ont. 115	Ministry of Education — Grants	Education Act: Grants for Student Needs — Legislative Grants for the 2014-2015 School Board Fiscal Year Regulation, under the <i>Education Act</i> , O. Reg. 76/14, s. 3; as am. O. Reg. 199/15, s. 1; as am. O. Reg. 214/16, s. 1	Keep to make available on request at offices of Education Finance Branch of Ministry of Education / on website
Ont. 116	Ministry of Education — Grants	Grants for Student Needs — Legislative Grants for the 2015-2016 School Board Fiscal Year, under the <i>Education Act</i> , O. Reg. 195/15, s. 3; as am. O. Reg. 219/16, s. 1	Keep to make available on request at offices of Education Finance Branch of the Ministry of Education / on Ministry’s website
Ont. 117	Boards — Posting of Positions of Assignments	Hiring Practices Regulation, under the <i>Education Act</i> , O. Reg. 274/12, ss. 12(1), 13(1), 14(2)	Not specified See Fed. 33 - 6 years

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 118	Boards — Long-Term Occasional Teachers Lists	Hiring Practices Regulation, under the <i>Education Act</i> , O. Reg. 274/12, s. 10(1), (4)	Not specified “shall maintain/post” See Fed. 33 - 6 years
Ont. 119	Boards — Asthma Policies	<i>Ryan’s Law (Ensuring Asthma Friendly Schools)</i> , 2015, S.O. 2015, c. 3, s. 2(1)	Not specified “shall maintain”
Ont. 120	Schools Boards — Anaphylactic Policies	<i>Sabrina’s Law, 2005</i> , S.O. 2005, c. 7, s. 2.(1)	Not specified “shall maintain”
Ont. 121	School, Private School, Day Nursery Operators — Post 1990 Plumbing Weekly Flushing and Verification Records	Schools, Private Schools and Child Care Centres Regulation, under the <i>Safe Drinking Water Act, 2002</i> , O. Reg. 243/07, s. 3(4), (5), 9	<p>6 years</p> <p>9. (1) The operator of a school, private school or child care centre shall ensure that the following documents and other records are kept for at least six years:</p> <ol style="list-style-type: none"> <li>1. Every record made under section 3, 4, 4.1, 5 or 5.1.               <ol style="list-style-type: none"> <li>1.1 The instructions provided by the manufacturer of a filter or other device referred to in paragraph 6.2 of subsection 5 (2).</li> </ol> </li> <li>Every test result obtained in respect of a test required under section 5, 5.1 or an order.</li> <li>2. Every test result in respect of which a report was required under section 6.</li> <li>4. A copy of every director’s direction given under section 4.1, subsection 5 (2.2) and section 5.1.</li> <li>5. A copy of every report provided or received under subparagraphs 5.3 iii and iv of subsection 5 (2).</li> </ol>

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont 121 (contd)			<p>6. A copy of every director's direction given under section 4.1, subsection 5 (2.2) and section 5.1.</p> <p>7. A copy of every report provided or received under subparagraphs 5.3 iii and iv of subsection 5 (2). O. Reg. 243/07, s. 9 (1); O. Reg. 417/09, s. 10; O. Reg. 459/16, s. 12 (1-3).</p>
Ont. 122	School, Private School, Day Nursery Operators — Pre 1990 Plumbing Daily Flushing and Verification Records	<i>Schools, Private Schools and Child Care Centres Regulation</i> , under the <i>Safe Drinking Water Act, 2002</i> , O. Reg. 243/07, ss. 4(4), (5), 9	6 years See Ont. 121
Ont. 123	School, Private School, Day Nursery Operators — Cold Water Sample and Lead Testing Records	<i>Schools, Private Schools and Child Care Centres Regulation</i> , under the <i>Safe Drinking Water Act, 2002</i> , O. Reg. 243/07, s. 5(2) par. 12, 9	6 years See Ont. 121
Ont. 124	School, Private School, Day Nursery Operators — Safe Drinking Water Records/Test Results	<i>Schools, Private Schools and Child Care Centres Regulation</i> , under the <i>Safe Drinking Water Act, 2002</i> , O. Reg. 243/07, s. 8.(1) par. 1, (3)	2 years; at school during normal business hours

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 125	School, Private School, Day Nursery Operators — Cold Water Sample Test Results/Orders	<i>Schools, Private Schools and Child Care Centres Regulation, under the Safe Drinking Water Act, 2002, O. Reg. 243/07, ss. 8(1) par. 2, (3)</i>	6 years; but shall keep readily available at school
Ont. 126	School, Private School, Day Nursery Operators — Test Result Reports/Orders	<i>Schools, Private Schools and Child Care Centres Regulation, under the Safe Drinking Water Act, 2002, O. Reg. 243/07, ss. 8(1) par. 3, (3)</i>	6 years; 2 years readily available at school
Ont. 127	School, Private School, Day Nursery Operators — Regulations	<i>Schools, Private Schools and Child Care Centres Regulation, under the Safe Drinking Water Act, 2002, O. Reg. 243/07, 8(1)</i>	Keep to make available on request at school
Ont. 128	School, Private School, Day Nursery Operators — Records Retention	<i>Schools, Private Schools and Child Care Centres Regulations, under the Safe Drinking Water Act, 2002, O. Reg. 243/07, ss. 9.(1), (2)</i>	See Ont. 121
Ont. 129	School, Private School, Day Nursery Operators — Director’s Directions	<i>Schools, Private Schools and Child Care Centres Regulation, under the Safe Drinking Water Act, 2002, O. Reg. 243/07, ss. 8(1) par. 3.1, (4)</i>	6 years; 2 years readily available at school

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 130	School, Private School, Day Nursery Operators — Combined Report	Schools, Private Schools and Child Care Centres Regulation, under the <i>Safe Drinking Water Act, 2002</i> , O. Reg. 243/07, ss. 9(1) par. 5, (2)	6 years; 2 years readily available at school
Ont. 131	Health Tax – Limitation Period	<i>Employer Health Tax Act, RSO 1990, c. E.11, s. 8(1)</i>	Event + 4 years Event = later of (1) the day on which the return was delivered or received by the Minister and (2) the day the return was required to be delivered.
Ont. 132	Complaints — Limitation Period	<i>Human Rights Code, RSO 1990, c. H.19, s. 34.(1)</i>	Event + 1 year Event = incident to which application relates or last incident in series
Ont. 133	Applications regarding Contravened Settlements — Limitation Period	<i>Human Rights Code, RSO 1990, c. H.19, s. 45.9.(3)</i>	Event + 6 months Event = contravention or last of contravention in series
Ont. 134	Designations of Special Programs — Limitation Period	<i>Human Rights Code, R. S. O. 1990, c. H.19, s. 14(6); as en. S. O. 2006, c. 30, s. 1</i>	Event + 5 years Event = day issued or earlier as may be specified by Commission
Ont. 135	Industrial Establishment Accident Records	Industrial Establishments Regulation, under the <i>Occupational Health and Safety Act, RRO 1990, Reg. 851, ss. 5.(3),(4), 6</i>	6. Where, under section 5 or 51, a report or permanent record is prescribed to be kept, it shall be kept for, a period of at least one year; or such longer period as is necessary to ensure that at least the two most recent reports or records are kept.

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 136	Pension Benefits Offence Prosecutions — Limitation Period	<i>Pension Benefits Act, RSO 1990, c. P.8, s. 110(6)</i>	Event + 5 years Event = Offence occurred or alleged occurred
Ont. 137	Minister — Posting of Accessibility Standards	<i>Accessibility for Ontarians with Disabilities Act, 2005, S. O. 2005, c. 11, s. 10.(1).</i>	Not specified
Ont. 138	Minister — Posting of Progress Reports	<i>Accessibility for Ontarians with Disabilities Act, 2005, S. O. 2005, c. 11, s. 11.(2).</i>	Not specified
Ont. 139	Income Tax Offences Limitations	<i>Income Tax Act, RSO 1990, c. I.2, s. 48.(3)</i>	Event + 8 years (Event = Date of Information or Complaint) 48.(3) An information or complaint under the Provincial Offences Act, in respect of an offence under this Act may be laid or made on or before the day that is eight years after the day on which the subjectmatter of the information or complaint arose.
Ont. 140	Employee wages	<i>Workplace Safety and Insurance Act, 1997, SO 1997, c. 16, Sched. A, s. 80(1)</i>	80.(1) A Schedule 1 employer shall keep accurate records of all wages paid to the employer’s workers and shall keep the records in Ontario.  See Fed. 33 6 years



Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 141	Operational Procedures, Tests and Corrective Measures Records	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , O. Reg. 213/07, Division B, ss. 1.1.2.1 to 1.1.2.3	Event + 2 years Event = Report prepared; as long as current and immediately preceding report are available; retained at building premises for examination on request
Ont. 142	Fire Safety Plans	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , O. Reg 213/07, Division B, Part II, s. 2.8.2.1, Division C, s. 1.3.2.5.(3)	Not specified “shall be kept in building in an approved location”
Ont. 143	Posting of Fire Emergency Procedures	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , OR 213/07, Division B, Part II, ss. 2.8.2.5.(1),(2)	Not specified
Ont. 144	Fire Drill Records	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , OR 213/07, Division B, Part II, s. 2.8.3.4.(1), (2)	Event + 1 year (12 months) Event = fire drill
Ont. 145	Posting of Portable Extinguisher Locations/Operating Instructions	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , OR 213/07, Division B, Part VI, ss. 6.2.1.5, 6.2.4.4	Recommend Post Most Current
Ont. 146	Portable Extinguisher Maintenance Records	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , OR 213/07, Division B, Part VI, s. 6.2.7.5	Not specified “shall be maintained”  Recommend Event + 2 years (Event = Maintenance)

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 147	Tests Records of Devices, Components and Circuits of Fire Alarm Systems	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , OR 213/07, Division B, Part VI, s. 6.3.2.2.(4), Division B, s. 1.1.2.1, 1.1.2.2	Event + 2 years Event = Report prepared; as long as current and immediately preceding report are available; retained at building premises for examination on request
Ont. 148	Test Records of Fire Alarm Monitoring Signals	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , OR 213/07, Division A, Part VI, s. 6.3.2.2.(5), Division B, s. 1.1.2.1, 1.1.2.2	Event + 2 years Event = Report prepared; as long as current and immediately preceding report are available; retained at building premises for examination on request
Ont. 149	Sprinkler Systems Inspections Records	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , OR 213/07, Division B, Part VI, ss. 6.5.1.8.(1),(2)	Not specified “shall be kept” Recommend Event + 2 years (Event = Inspection)
Ont. 150	Special Fire Suppression Systems — Inspection, Maintenance and Testing Records	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , OR 213/07, Division B, Part VI, s. 6.8.2.2, Division B, s. 1.1.2.1, 1.1.2.2	Event + 2 years Event = Report prepared; as long as current and immediately preceding report are available; retained at building premises for examination on request
Ont. 151	Fire Protection Systems — Test, Corrective, Measure or Operational Procedure Reports	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , OR 213/07, Division B, s. 1.1.2.2 (2)	Event = Shall be retained throughout life of systems.

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 152	Lead Employers / Contractors — Confined Space Co-ordination Documents	Confined Spaces Regulations, under the <i>Occupational Health and Safety Act</i> , OR 632/05, ss. 4.(2),(4), 21	Longer of: Event + 1 year (Event = document created) Or: Event = Period necessary to ensure 2 most recent records of each kind are retained
Ont. 153	Employers — Confined Space Assessments	Confined Spaces Regulations, under the <i>Occupational Health and Safety Act, 1997</i> , OR 632/05, ss. 6.(1) to (4)	Not specified “shall ensure carried out/recorded in writing”
Ont. 154	Employers — Confined Space Atmospheric Test Records	Confined Spaces Regulations, under the <i>Occupational Health and Safety Act</i> , OR 632/05 ss. 18 (1) to (6); s. 21.(1)	Longer of: Event + 1 year Event = Document created Or: Event = Period necessary to ensure 2 most recent records retained
Ont. 155	Employers — Confined Space Programs	Confined Spaces Regulations, under the <i>Occupational Health and Safety Act</i> , OR 632/05, s. 5.(1);	Not specified “shall ensure maintained”
Ont. 156	Employers — Confined Space Plans	Confined Spaces Regulations, under the <i>Occupational Health and Safety Act</i> , OR 632/05, s. 7.(1)	Not specified “shall ensure developed”
Ont. 157	Employers — Workplace Violence / Harassment Policies and Information	<i>Occupational Health and Safety Act, R. S. O. 1990, c. O.1</i> , ss. 32.0.1.(1),(2), 32.0.5.(2) to (4), 32.0.	Not specified “shall prepare/keep to provide on request”

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 158	Employers — Worker Exposure to Airborne Concentrations of Designated Substances Results	Designated Substances Regulation, under the <i>Occupational Health and Safety Act</i> , OR 490/09, s. 25 (c)	Keep no less than 5 years
Ont. 159	Employers — Worker Personal Exposure Records	Designated Substances Regulation, under the <i>Occupational Health and Safety Act</i> , OR 490/09, s. 27	Not specified “shall provide”
Ont. 160	Physicians — Worker Personal Exposure Records	Designated Substances Regulation, under the <i>Occupational Health and Safety Act</i> , OR 490/09, s. 30	Later of: Event + 40 years Event = Date first record created in personal exposure record And: Event + 20 years Event = Date last record added to personal exposure record And If physician not able to keep shall forward to Provincial Physician or employer who shall keep until end of retention dates

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 161	Physicians — Worker Clinical Tests and Examination Records	Designated Substances Regulation, under the <i>Occupational Health and Safety Act</i> , OR 490/09, s. 31	Later of: Event + 40 years Event = Date first record created in personal exposure record And: Event + 20 years Event = Date last record added to personal exposure record And If physician not able to keep shall forward to Provincial Physician or employer who shall keep until end of retention dates
Ont. 162	Constructors or Employers — Posting of Health/Safety Committee Information	<i>Occupational Health and Safety Act</i> , RSO 1990, c. O.1, s. 9(32).	Not specified Recommend Posting Most Current
Ont. 163	Building Owners / Employers — Posting of Clearance Air Testing Results	Designated Substance — Asbestos on Construction Projects and in Buildings and Repair Operations Regulation, under the <i>Occupational Health and Safety Act</i> , OR 278/05, s. 18.(8)	Not specified
Ont. 164	Pesticide Offence Proceedings — Limitation Period	<i>Pesticides Act</i> , RSO 1990, c. P.11, s. 48	Event + 2 years Event = Later of: day offence committed; and day evidence of offence first came to attention of provincial officer or Director
Ont. 165	Employers — Assessment for Hazardous Materials	<i>Occupational Health and Safety Act</i> , RSO. 1990, c. O.1, s. 39	Keep to make available on request

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 166	Posting of Warning of Hazardous Physical Agents	<i>Occupational Health and Safety Act, RSO 1990, c. O.1, ss. 41 (1),(2)</i>	Not specified
Ont. 167	Posting of Hazardous Physical Agents Notices	<i>Occupational Health and Safety Act, RSO 1990, c. O.1, ss. 41 (3),(4)</i>	Not specified
Ont. 168	Employers — Assessment for Hazardous Materials	<i>Occupational Health and Safety Act, RSO. 1990, c. O.1, s. 39</i>	Keep to make available on request
Ont. 169	Employers — Hazardous Biological or Chemical Agent Exposure Records	Control of Exposure to Biological or Chemical Agents Regulations, under the <i>Occupational Health and Safety Act, RRO 1990, R. 833, s. 8.(4)</i>	Keep to make available to physician on request
Ont. 170	Notice of Garnishment Extension Orders — Limitation Period	Rules of the Small Claims Court Regulation, under the <i>Courts of Justice Act, OR 258/98, rule 20.08.(2.1)</i>	Event + 6 years Event = Order made; unless leave of court
Ont. 171	Notice of Garnishment where Extension Order — Limitation Period	Rules of the Small Claims Court Regulation, under the <i>Courts of Justice Act, OR 258/98 rule 20.08.(2.2),(2.3)</i>	Event + 1 year Event = Date order granting leave to issue made
Ont. 172	Notices of Garnishment — Limitation Period	Rules of the Small Claims Court Regulation, under the <i>Courts of Justice Act, OR 258/98, rule 20.08.(5.1),(5.2)</i>	Event + 6 years Event = Date of issue or renewal

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 174	Registered Code Agency Records — Construction Inspections and Orders	Building Code Regulation, (Part V), under the <i>Building Code Act, 1992</i> , OR 332/12, Division C, ss. 3.7.4.2.(3) to (5)	Not specified “shall prepare”
Ont. 175	Engineer’s Safety Net Inspections/Tests Documentation	Construction Projects Regulation, under the <i>Occupational Health and Safety Act</i> , OR 213/91, s. 19; ss. 26.8.(4),(5)	Event + 1 year Event = Project finished
Ont. 176	Workplace Hazardous Materials Information System (WHMIS)	Workplace Hazardous Materials Information System (WHMIS) Regulations, under the <i>Occupational Health and Safety Act, RRO. 1990</i> , R. 860, ss. 3.(1), 7	Not specified “shall ensure developed/assess”
Ont. 177	Monitoring & Reporting	Airborne Contaminant Discharge Monitoring and Reporting Regulation, under the <i>Environmental Protection Act</i> , OR 127/01, ss. 6, 12, 13	Event + 7 years Event = Day report required to be submitted or day record required to be prepared 12. The owner and the operator of a facility who are required to ensure that a report is submitted under section 6 shall ensure that a copy of the report and of any record prepared for the purposes of the report are kept for at least seven years after the day the report is required to be submitted and shall ensure that any other record required to be prepared under this Regulation is kept for at least seven years after the day the record is required to be prepared

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 178	Monitoring & Reporting	Airborne Contaminant Discharge Monitoring and Reporting Regulation, under the <i>Environmental Protection Act</i> , O. R. 127/01, s. 11; as am. O. R. 37/06, s. 8	Event = Shall be maintained in accordance with Guideline. 11. The owner and the operator of a facility who are required under section 3 or 4 to ensure that air emissions of a contaminant are monitored and calculated shall ensure that such records as may be specified in the Guideline are prepared and maintained in accordance with the Guideline.
Ont. 179	Engineers' Log Books	Operating Engineers Regulation, under the <i>Technical Standards and Safety Act, 2000</i> , OR 219/01, s. 37	Event + 3 years Event = Last entry made; at plant; shall retain electronic log or hard copies; logbook shall be bound and constructed so pages numbered and cannot be removed; in ink; any corrections shall not be erased but crossed out, corrected and initialled; if electronic user shall ensure dated paper print-out is created at end of each shift; No person shall destroy without permission of owner or user, or remove logbook from plant
Ont. 180	Fire Systems Inspections Approved Records	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , O. Reg. 213/07, Division B, Part VI, ss. 6.5.1.8(1), (2)	Not Specified "shall be kept". An "Approved" record means approved by the Chief Fire Official.



Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 181	Ontario Water Resources Act Offence Proceedings – Limitation Period	<i>Ontario Water Resources Act, RSO. 1990, c. O. 40, s. 94</i>	Event + 2 years Event = later of: date offence committed and date: offence first came to attention of designated person
Ont. 182	Fixed Support Inspections, Tests, Repairs, Modifications and Maintenance Forms	Construction Projects Regulation, under the <i>Occupational Health and Safety Act, O. Reg. 213/91, s. 141.4(6)</i>	Not specified “shall keep permanent record”
Ont. 183	Scaffold/Anchor Points Log Book	Window-Cleaning Regulation, under the <i>Occupational Health and Safety Act, RRO 1990, Reg. 859, s. 41.(5)</i>	Event = Maintain and retain as long as anchor points and suspended scaffold are used
Ont. 184	Hydrant Operations Records	Fire Code, under the <i>Fire Protection and Prevention Act, 1997, O. Reg. 213/07, Division B, Part VI, s. 6.6.5.8, Division B, Part I, ss. 1.1.2.1 to 1.1.2.3</i>	Event + 2 years Event = Report prepared; as long as current and immediately preceding report are available; retained at building premises for examination on request
Ont. 185	Emergency Electrical Power Supply Records	Fire Code, under the <i>Fire Protection and Prevention Act, 1997, O. Reg. 213/07, Division B, Part VI, s. 6.7.1.3</i>	Event = Shall be maintained as required in CSA–C282, “Emergency Electrical Power Supply for Buildings
Ont. 188	Liquid Gain or Loss Measurements for Storage Tests	Fire Code, under the <i>Fire Protection and Prevention Act, 1997, O. Reg. 213/07, Division B, Part IV, ss. 4.3.16.1(3), (4), Division B, Part I, ss. 1.1.2.1 to 1.1.2.3</i>	Event + 2 years Event = Report prepared; as long as current and immediately preceding report are available; retained at building premises for examination on request

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 189	Out of Service Underground Storage Tanks — Liquid Measurement Levels Records	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , O. Reg. 213/07, Division B, Part IV, ss. 4.3.17.1(1)(a), (2)(c), (3)(a)(i), (ii)	Not specified “shall be retained”
Ont. 190	Piping Systems for Flammable Liquids or Combustible Liquids Documentation	Fire Code, under the <i>Fire Protection and Prevention Act, 1997</i> , O. Reg. 213/07, Division B, Part IV, s. 4.4.6.2, Division B, Part I, ss. 1.1.2.1 to 1.1.2.3	Event + 2 years Event = Report prepared; as long as current and immediately preceding report are available; retained at building premises for examination on request
Ont. 191	Auditor’s Reports	<i>Municipal Act, 2001</i> , SO 2001, c. 25, ss. 296.(6), (7)	Keep to make available during normal office hours
Ont. 192	Parking Conviction Records	<i>Provincial Offences Act, RSO 1990, c. P.33</i> , s. 18.2.(6)	Not specified “shall record”
Ont. 193	Parking Offence Prosecutions after Notice of Appearance Filed or No Notice of Dispute Filed — Limitation Period	<i>Provincial Offences Act, RSO 1990, c. P.33</i> , s. 18.1.(2)	75 days
Ont. 194	Building Code Act Offence Prosecutions — Limitation Period	<i>Building Code Act, 1992, SO 1992, c. 23</i> , s. 36.(8), (8.1)	1 year 36.(8) No proceeding under this section shall be commenced more than 1 year after the time when the subject-matter of the proceeding arose.

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 195	Recovery of Future Estate Claims — Limitation Period	<i>Real Property Limitations Act, RSO. 1990, c. L.15, s. 6(1).</i>	Longer of: Event + 5 years Event = Estate of entitled person vested in possession And: Event + 10 years (Event = Right to make entry or distress or bring action for recovery of land or rent first accrued)
Ont. 196	Operations and Maintenance Manuals	Licensing of Sewage Works Operators Regulation, under the <i>Ontario Water Resources Act, O. Reg. 129/04, s. 20</i>	2 years and after review
Ont. 197	Operator-in-charge — Adjustment and Equipment Operating Status Records	Licensing of Sewage Works Operators Regulation, under the <i>Ontario Water Resources Act, OR 129/04, ss. 18.(2)(c)(d).</i>	Not specified “shall ensure maintained/prepared”
Ont. 198	Financial Statements - Annual	<i>Municipal Act, 2001, SO 2001, c. 25, s. 294.1</i>	Not specified “shall prepare” 294.1 A municipality shall, for each fiscal year, prepare annual financial statements for the municipality in accordance with generally accepted accounting principles for local governments as recommended, from time to time, by the Public Sector Accounting Board of the Canadian Institute of Chartered Accountants.

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 206	Pregnancy / Parental / Emergency Leaves	<i>Employment Standards Act, 2000, SO 2000, c. 41, s. 15(7)</i>	Event + 3 years Event = day after which the leave expired
Ont. 207	Employee Work Hours	<i>Employment Standards Act, 2000, SO 2000, c. 41, s. 15(1), par. 4</i>	CY +5 years 15.(5) The employer shall retain or arrange for some other person to retain the records of the information required under this section for the following periods: ..... 3. For information referred to in paragraph 4 of subsection (1) or in subsection (5, years after the day or week to which the information relates
Ont. 208	Schedule 1 Employers — Wages Record	<i>Workplace Safety and Insurance Act, 1997, SO 1997, c. 16, Schedule A, s. 80</i>	Not specified “shall keep in Ontario”
Ont. 209	Wage Statements and Termination Pay Records	<i>Employment Standards Act, 2000, SO 2000, c. 41, ss. 15(1) par. 5; s. 15(5) par. 4; s. 16</i>	Event + 3 years Event = Information given to employee
Ont. 210	Accessibility Training Records - Designated Public Sector Organizations	Integrated Accessibility Standards Regulation, under the <i>Accessibility for Ontarians with Disabilities Act, 2005, O. Reg. 191/11, s. 7(5)</i>	Not specified “shall keep”

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 211	Annual Status Reports - - Designated Public Sector Organizations	Integrated Accessibility Standards Regulation, under the <i>Accessibility for Ontarians with Disabilities Act, 2005</i> , O. Reg. 191/11, s. 4(3)	Not specified “shall prepare/post
Ont. 212	Multi-Year Accessibility Plans - Designated Public Sector Organizations	Integrated Accessibility Standards Regulation, under the <i>Accessibility for Ontarians with Disabilities Act, 2005</i> , O. Reg. 191/11, s. 4(1)	Not specified “shall maintain/post/review every 5 years”
Ont. 214	Persons or Organizations to whom Accessibility Standard Applies — Accessibility Reports & compliance information	<i>Accessibility for Ontarians with Disabilities Act, 2005</i> , SO. 2005, c. 11, ss. 14.(1) to (4), 17	<p>Shall file and keep to make available to the public on request.</p> <p>Shall provide the director with reports or information relating to the compliance of the person or organization with the accessibility standards.</p> <p>CY+6 The Accessibility Directorate Compliance reports for 6 years.</p>
Ont. 215	Operator-in-charge Records	Licensing of Sewage Works Operators Regulation, under the <i>Ontario Water Resources Act</i> , OR 129/04, s. 17.(2).	Not specified “shall ensure maintained”

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 216	Posting of Certificate of Classification of Facility	Licensing of Sewage Works Operators Regulation, under the <i>Ontario Water Resources Act</i> , OR 129/04, s. 4.(5)	Not specified
Ont. 217	Accident Claims – Limitation Period	<i>Workplace Safety and Insurance Act, 1997, SO 1997, c. 16, Schedule A, s. 22(1), (3)</i>	<p>Event + 6 months                      Event = accident or when worker learns he/she suffers from disease</p> <p>22.(1) A worker shall file a claim as soon as possible after the accident that gives rise to the claim, but in no case shall he or she file a claim more than six months after the accident or, in the case of an occupational disease, after the worker learns that he or she suffers from the disease.</p>

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 219	Construction Accident Records	Construction Projects Regulation, under the <i>Occupational Health and Safety Act</i> , OR 213/91, s. 10	<p>Permanent</p> <p>10.(1) An employer shall keep in the employer’s permanent records a record of any accident, explosion or fire involving a worker that causes injury requiring medical attention but does not disable the worker from performing his or her usual work.</p> <p>(2) The record shall include particulars of,</p> <ul style="list-style-type: none"> <li>(a) the nature and circumstances of the occurrence and the injury sustained by the worker;</li> <li>(b) the time and place of the occurrence;</li> <li>(c) the name and address of the injured worker; and</li> <li>(d) the steps taken to prevent a recurrence.</li> </ul> <p>(3) An employer to whom subsection (1) applies shall make the record available to an inspector upon request.</p>
Ont. 220	Health & Occupational Safety Prosecutions Limitation Period –	<i>Occupational Health and Safety Act, RSO 1990, c. O.1, s. 69</i>	<p>Event + 1 year</p> <p>Event = last act or default</p> <p>69. No prosecution under this Act or the regulations shall be instituted more than one year after the later of,</p> <ul style="list-style-type: none"> <li>(a) the occurrence of the last act or default upon which the prosecution is based; or</li> <li>(b) the day upon which an inspector becomes aware of the alleged offence. 2017, c. 34, Sched. 30, s.5.</li> </ul>

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 221	Proceedings Where No Limitation Period	<i>Limitations Act, 2002, S.O. 2002, c. 24, Schedule B, s. 16(1)</i>	Event = There is no limitation period for <ul style="list-style-type: none"> <li>- Environmental Claims not discovered</li> <li>- sexual assault or sexual misconduct proceedings</li> <li>- proceedings with no consequential relief or to enforce a court order</li> <li>- arbitration act or civil remedies act proceeding</li> <li>- proceeding with collateral</li> </ul>
Ont. 222	Municipal By-law Votes — Limitation Period	<i>Municipal Elections Act, 1996, S. O. 1996, c. 32, ss. 8.3.(1),(5)</i>	Event + 4 years Event = day action took effect, or voting day
Ont. 223	Provincial Offence Prosecutions — Limitation Period	<i>Provincial Offences Act, RSO 1990, c. P.33, s. 76</i>	Retention/Limitation: Event + 0.5 years (6 months) Event = Date offence was/alleged committed Description: 76.(1) A proceeding shall not be commenced after the expiration of any limitation period prescribed by or under any Act for the offence or, where no limitation period is prescribed, after six months after the date on which the offence was, or is alleged to have been, committed. (2) A limitation period may be extended by a justice with the consent of the defendant.



Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 224	Land and Legacy Claims — Limitation Period	<i>Real Property Limitations Act, RSO 1990, c. L.15, s. 23.(1)</i>	Event + 10 years Event = Acknowledgement/last payment
Ont. 225	Audit of pupil enrolment records and related documents	<i>Ministry of Education Enrolment Management Instructions for Elementary and Secondary Schools</i>	<p>The Ministry requires that for audit purposes, pupil enrolments and various related documents must be retained for the current year plus two additional school years (CY+2). Records can be stored electronically or in paper format unless otherwise specified. Where a principal's certification/signature is required (electronic signatures are acceptable), it can also be stored in an electronic (emails are acceptable) or paper format.</p> <p><a href="http://www.edu.gov.on.ca/en/policyfunding/forms.html#ec">http://www.edu.gov.on.ca/en/policyfunding/forms.html#ec</a></p> <p>See above link for list of documents</p>
Ont. 226	Supervised Alternative Learning & Other Excusals from Attendance at School	<i>Education Act Reg. 374/10</i>	<a href="https://www.ontario.ca/laws/regulation/100374#BK">https://www.ontario.ca/laws/regulation/100374#BK</a>
Ont. 227	Serious Student Incidents reported on the Safe Schools Incident Reporting Form	Progressive Discipline & promoting Positive Student Behaviour	<p>Policy/Program Memorandum 145</p> <p><a href="http://www.edu.gov.on.ca/extra/eng/ppm/145.pdf">www.edu.gov.on.ca/extra/eng/ppm/145.pdf</a></p>

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
Ont. 228	Psychological Services Provider Client Records	College of Psychologists of Ontario – Standards of Professional Practice 2017	<a href="http://www.cpo.on.ca/WorkArea/DownloadAsset.aspx?id=1716">http://www.cpo.on.ca/WorkArea/DownloadAsset.aspx?id=1716</a>
Ont. 330	Speech Service providers Client Records	College of Audiologists and Speech Language Pathologists of Ontario	<a href="http://www.caslpo.com/express/current-issue/volume-1issue-2-sept-2015">http://www.caslpo.com/express/current-issue/volume-1issue-2-sept-2015</a>
Ont. 332	Environmental Assessments	<i>Environmental Assessment Act, RSO 1990, c. E.18, s. 6.1(1); s. 6.4(1)</i>	Not specified “shall prepare/keep to provide on request at times set out in notice”
Ont. 333	Violent Student Incidents	<i>Reporting Violent Incidents to the Ministry of Education</i>	<i>Policy/Program Memorandum 120</i> <a href="http://www.edu.gov.on.ca/extra/eng/ppm/120.html">http://www.edu.gov.on.ca/extra/eng/ppm/120.html</a>
	College Members – Client Records	Ontario College of Social Workers and Social Service Workers  Code of Ethics and Standards of Practice Handbook – Second Edition <a href="https://www.ocswssw.org/wpcontent/uploads/2018/09/Code-of-Ethicsand-Standards-of-Practice-September-7-2018.pdf">https://www.ocswssw.org/wpcontent/uploads/2018/09/Code-of-Ethicsand-Standards-of-Practice-September-7-2018.pdf</a>	Retention  Event + 7 years (Event = Date of last entry in the record, or if client was less than 18 years at date of last entry, the day the client became or would have become eighteen)

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
	Physiotherapists – Clinical and Financial Records	College of Physiotherapists of Ontario  Record Keeping Standard <a href="https://www.collegept.org/rules-andresources/recordkeeping">https://www.collegept.org/rules-andresources/recordkeeping</a>	Retention Event + 10 years (Event = Later of the date of the last patient encounter or the date the patient reached, or would have reached, 18 years of age)
	Occupational Therapist - Records	College of Occupational Therapists of Ontario  Record Keeping Standard  <a href="https://www.coto.org/docs/defaultsource/defaultdocument-library/recordkeeping-standardjan1.pdf?sfvrsn=ea445359_10">https://www.coto.org/docs/defaultsource/defaultdocument-library/recordkeeping-standardjan1.pdf?sfvrsn=ea445359_10</a>	Retention Event + 10 years (Event = Date of last entry in the record, or if client was less than 18 years at date of last entry, the day the client became or would have become eighteen)
	Public Sector Organizations – Collected personal information	<i>Anti-Racism Act SO 2017, c. 15, s. 7(10)</i>	Event + 1 year (Event = Day the information was last used by the organization)
	Employers – Records on Payments	<i>Employment Protection for Foreign Nationals Act, 2009 SO 2009, c. 32, s. 14(1)</i>	Event + 7 years (Event = Earlier of the date the employee ceases to be employed by the employer; or the employee becomes a permanent resident)
	Employers – Dates of Employee work and Wages	<i>Government Contract Wages Act, 2018 S.O. 2018, c.9, s. 8(1), par. 1, 8(2), par. 1</i>	Event + 3 years (Event = the day or week to which the information relates)

Citation Table No.	Subject Matter	Ontario Citation	Retention Requirement or Limitation Period
	Employers – Subcontracting Information	<i>Government Contract Wages Act, 2018 S.O. 2018, c.9, s. 8(1), par. 2-3, 8(2), par2</i>	Event + 3 years (Event = the last day work was performed under the subcontract)
	Operator of a Food Premise – Pest Control Measures	Food Premises under the <i>Health Protection and Promotion Act</i> , O.Reg 493/17, s. 13(2)	Event + 1 year (Event = date the records are made)
	Operator of a Food Premise – Food Processing Records	Food Premises under the <i>Health Protection and Promotion Act</i> , O.Reg 493/17, s. 29(2)	Not specified “Shall post”
	Employer – Pay Transparency Report	<i>Pay Transparency Act, 2018, S.O. 2018, c. 5, s. 7(5)</i>	Not specified “Shall post”
	Licensee – Public Vehicle Records	General Regulation under the <i>Public Vehicles Act</i> , Reg. 982, s. 24	Not specified “Shall keep”
	Provincial Offence Tax Prosecutions — Limitation Period	<i>Income Tax Act, RSO 1990, c. 1.2, s. 48.(3);</i> as am. S. O. 2004, c. 16, s. 3.	Event + 8 years (Event = Day subject matter of information/complaint arose)
	Licensee – Liquor – Special Occasion Permit	<i>Liquor Licence Act, R.S.O. 1990, c.L.19</i>	Not specified <b>19</b> (1) A person may apply to the Registrar for a permit authorizing the holder thereof to sell or serve liquor on a prescribed special occasion <b>43</b> (1) The Registrar may designate persons employed by the Alcohol and Gaming Commission of Ontario as persons who may carry out inspections for the purpose of determining whether there is compliance with this Act and the regulations.

# Federal Citation Table

Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 1	GST/HST – Electronic format	<p>Canada Revenue Agency, GST/HST Memoranda Series</p> <p>Chapter 15: Books and Records (Revised July 1999)</p> <p>15.2 Computerized Records, June 2005</p> <p>Electronic records Records, books of account, documents and other information in electronic form used for purposes of the verification of the Goods and Services Tax / Harmonized Sales Tax (GST/HST) charged and remitted on taxable supplies of goods and services as well as the tax paid on purchases.</p>	<p>6 years</p> <p>286(3.1) 8. Persons who keep records in an electronic format are required to retain them in an electronically readable format for a period of six years from the end of the latest year to which they relate. This means that a person must retain the electronic records even when hard copy is available.</p>

Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 2	GST/HST – Electronic format	<p>Canada Revenue Agency, GST/HST Memoranda Series</p> <p>Chapter 15: Books and Records (Revised July 1999)</p> <p>15.1 General Requirements for Books and Records, June 2005</p> <p>Records that enable the determination of the tax charged and remitted on taxable supplies of goods and services as well as the tax paid on business purchases and claimed as an input tax credit (ITC) or rebate</p>	<p>24. Persons carrying on a business or engaged in a commercial activity, persons who are required to file a GST/HST return, and persons who make an application for a rebate are required to keep their books and records for a period of <b>six years</b> from the end of the latest year to which they relate.</p> <p>Electronic records ss 286(3.1) 25. Persons who keep records electronically are required to retain them in an electronically readable format for a period of <b>six years</b> from the end of the latest year to which they relate. A person must retain the electronic records even when hard copy is available.</p> <p>The minimum retention period for books and records is generally determined by the last year when a record may be required for purposes of the Act, and not the year when the transaction occurred and the record was created. e.g., records supporting the acquisition and capital cost of property should be maintained until the day that is six years from the end of the last year in which such an acquisition could enter into any calculation for GST/HST purposes, including the basic tax content of the property.</p>

Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 3	Assessment Period Liability – Limitation Period	<i>Excise Tax Act, RSC 1985, c. E-15, s. 298.(1)(f)</i>	Event + 4 years (Event = Person liable/person paid or remitted the amount; as applicable)
Fed. 4	Excise Tax Records and Books of Account	<i>Excise Tax Act, RSC. 1985, c. E-15, s. 98.(1)</i>	Event + 6 years (Event = End of calendar year for which records kept; or until written permission for prior disposal by Minister given; or longer if appeal)
Fed. 5	Canada Pension Plan Records	<i>Canada Pension Plan, RSC 1985, c. C-8, s. 24</i>	Event + 6 years (Event = end of year for which records and books of account are kept or written permission for their prior disposal is given by Minister, or end of appeal period.)
Fed. 6	Employers — Books of Account	<i>Employment Insurance Act, SC 1996, c. 23, s. 87</i>	Event + 6 years (Event = end of year for which they are kept, or until written permission for their prior disposal is given by the Minister or if appeal until the ruling is made or the appeal is disposed of and any further appeal is disposed of or the time for filing a further appeal has expired.)
Fed. 7	Employers — Undeliverable Record of Employment	Employment Insurance Regulations, under the <i>Employment Insurance Act, SOR/96-332, ss. 19.(2), (4)(b)</i>	Earliest of: 1 year or Event = copy is requested by the Commission or by person
Fed. 8	Employment Insurance Assessment — Limitation Period	<i>Employment Insurance Act, SC 1996, c. 23, s. 85.(3).</i>	Event + 3 years (Event = end of year in which any premium should have been paid, unless misrepresentation or fraud)

Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 9	Posting of Work Place Violence Prevention Policies and Emergency Notification Procedures	Canada Occupational Health and Safety Regulations, under the <i>Canada Labour Code</i> , SOR/86-304, ss. 20.3, 20.8.(2); as en. SOR/2008148, s. 1.	Not specified
Fed. 10	Work Place Violence Procedures and Emergency Notification Procedures	Canada Occupational Health and Safety Regulations, under the <i>Canada Labour Code</i> , SOR/86-304, ss. 20.6.(3), 20.7.(1), 20.8.(1); as en. SOR/2008-148, s. 1	Not specified “shall establish and update every 3 years”
Fed. 11	Work Place Violence Records	Canada Occupational Health and Safety Regulations, under the <i>Canada Labour Code</i> , SOR/86-304, s. 20.7.(3); as en. SOR/2008-148, s. 1.	3 years; in written or electronic form
Fed. 12	Investigation of Workplace Violence Reports	Canada Occupational Health and Safety Regulations, under the <i>Canada Labour Code</i> , SOR/86-304, s. 20.9.(5); as en. SOR/2008-148, s. 1.	Not specified “shall keep”
Fed. 13	Workplace Violence Training Records	Canada Occupational Health and Safety Regulations, under the <i>Canada Labour Code</i> , SOR/86-304, ss. 20.10.(2),(4),(5); as en. SOR/2008-148, s. 1.	Event + 2 years (Event = Date employee ceases to perform activity that has risk of work place violence associated with it; in paper or electronic form)



Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 14	Electronic Records Acceptability	<p><i>Personal Information Protection and Electronic Documents Act, SC 2000, c. 5, s. 37</i></p>	<p>Event = Retain for specified period in format made, sent or received, so can be read, and with information that identifies origin and destination</p> <p>Description:</p> <p>37. A requirement under a provision of a federal law to retain a document for a specified period is satisfied, with respect to an electronic document, by the retention of the electronic document if</p> <p>(a) the electronic document is retained for the specified period in the format in which it was made, sent or received, or in a format that does not change the information contained in the electronic document that was originally made, sent or received;</p> <p>(b) the information in the electronic document will be readable or perceivable by any person who is entitled to have access to the electronic document or who is authorized to require the production of the electronic document; and</p> <p>c) if the electronic document was sent or received, any information that identifies the origin and destination of the electronic document and the date and time when it was sent or received is also retained.</p>

Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 15	Storage Tank System Owners / Operators — Emergency Plans	Storage Tank Systems for Petroleum Products and Allied Petroleum Products Regulations, under the <i>Canadian Environmental Protection Act, 1999</i> , SOR/2008-197, ss. 30(1), 31(1), 46(1)	5 years; Keep readily available for individuals required to carry it out, and at place storage tank system located if place of work

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Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 16	Books of Account	<i>Income Tax Act, RSC 1985 (5<sup>th</sup> Supp.), c. 1, s. 230(4)</i>	<p>FY + 6 years (FY= Fiscal Year)</p> <p>4) Every person required by this section to keep records and books of account shall retain</p> <p>(a) the records and books of account referred to in this section in respect of which a period is prescribed, together with every account and voucher necessary to verify the information contained therein, for such period as is prescribed; and</p> <p>(b) all other records and books of account referred to in this section, together with every account and voucher necessary to verify the information contained therein, until the expiration of six years from the end of the last taxation year to which the records and books of account relate.</p> <p>(4.1) Every person required by this section to keep records who does so electronically shall retain them in an electronically readable format for the retention period referred to in subsection 230(4).</p>

			(4.2) The Minister may, on such terms and conditions as are acceptable to the Minister, exempt a person or a class of persons from the requirement in subsection 230(4.1).
Fed. 17	Books of Account	<i>Income Tax Act, RSC 1985 (5th Supp.), c. 1, s. 230(1), (2.1), (5)</i>	Filing date +6 years  Where, in respect of any taxation year, a person referred to in section 230 subsection (1) has not filed a return with the Minister as and when required by section 150, that person shall retain every record and book of account that is required by this section to be kept and that relates to that taxation year, together with every account and voucher necessary to verify the information contained therein, until the expiration of six years from the day the return for that taxation year is filed.
Fed. 18	Books of Account	Income Tax Regulations, under the <i>Income Tax Act, C.R.C. 1978, c. 945, s. 5800 (2)</i>	Two years after the end of the last calendar year to which the records or books of account relate.

Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 19	Books of Account	<i>Income Tax Act, RSC 1985, c. 1 (5th Supp.), s. 230</i>	Event + 6 years (Event = end of last taxation year to which records and books of account relate, or year return filed, as long as no other exceptions apply)
Fed. 20	Tax Limitation Period	<i>Income Tax Act, RSC 1985, c. 1 (5th Supp.), ss. 222.(3),(4),(5),(8) to (10)</i>	Event + 10 years (Event = Day begins as defined; unless exceptions herein apply)
Fed. 22	Employee Medical Records	Designated Substances Regulation, under the <i>Occupational Health and Safety Act, O. R. 490/09, s. 31</i>	Later of: Event + 40 years (Event = Date first record created in personal exposure record) And: Event + 20 years (Event = Date last record added to personal exposure record) And If not able to keep shall forward to Provincial Physician <b>or employer who shall keep until end of retention dates</b>
Fed. 23	Books of Account	<i>Employment Insurance Act, SC 1996, c. 23, s. 87(3)</i>	CY +6 years  The employer shall retain the records and books of account and every account and voucher necessary to verify the information contained in them for six years after the year for which they are kept, or until written permission for their prior disposal is given by the Minister.

Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 25	Employee Termination	<i>Canada Labour Code, R.S.C. 1985, c. L-2, s. 252(2)</i>	T+3 years (T= after termination or ceased to be employed)
Fed. 26	Employee Termination	Canada Labour Standards Regulations, under the <i>Canada Labour Code, C.R.C. 1978, c. 986, ss. 24(2), as am., SOR/91461, s. 21; SOR/94-668, s. 7(2), (3), (4); 27(3)</i>	T+3 years (T= after termination or ceased to be employed) Three years after work is performed by an employee (C.R.C. 1978, c. 986, s. 24(2)(part), as am., SOR/94-668, s. 7(1))
Fed. 27	Employee Termination	Canada Labour Standards Regulations, under the <i>Canada Labour Code, C.R.C. 1978, c. 986, s. 24(1)</i>	T +2 years (T= after termination)  Twenty-four months after termination of employment (C.R.C. 1978, c. 986, s. 24(1)(part))
Fed. 30	Canada Pension Plan, Income Tax and Employment Insurance records <b>excluding</b> : <ul style="list-style-type: none"> <li>• corporation records (director &amp; shareholder meeting minutes, general ledger or other books of final entry)</li> <li>• registered charities</li> <li>political contributions</li> </ul>	Revenue Canada Information Circular IC7810R5 Book and Records Retention/Destruction. June 2010, para.24  interpretation of: Income Tax Regulations, CRC, c 945, ss5800 Income Tax Act, ss.230, ss.230.1 Employment Insurance Act, s.87 Canada Pension Plan, s.24	24. Six years from the end of the last tax year to which they relate and for which they may be required for purposes of the Act (which may not be the year when the transaction occurred and the record was created)

Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 33	Employers—Records of Employment	Employment Insurance Regulations, under the Employment Insurance Act, SOR/96-332, ss. 19.(2), (3), (3.1), (5), (6)	6 years
Fed. 34	Notice of Garnishment where Extension Order — Limitation Period	Rules of the Small Claims Court Regulation, under the Courts of Justice Act, OR 258/98, rule 20.08.(2.2),(2.3)	Event + 1 year (Event = Date order granting leave to issue made)
Fed. 36	Tax Limitation Period Tax Actions — Limitation Period	<i>Income Tax Act, RSC 1985, c. 1 (5th Supp.), ss. 222.(3),(4),(5),(8) to (10)</i>	Retention/Limitation: Event + 10 years (Event = Day begins as defined; unless exceptions herein apply)

Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 37	General Ledger, Contracts relevant to Ledger and Books of Final Entry)	Income Tax Regulations, under the <i>Income Tax Act</i> , <i>CRC. 1978, c. 945, s. 5800.(1)(a)</i>	<p>Event + 2 years (Event = day corporation dissolved)</p> <p>5800.(1) For the purposes of paragraph 230.(4)(a) of the Act, the required retention periods for records and books of account of a person are prescribed as follows: (a) in respect of (i) any record of the minutes of meetings of the directors of a corporation, (ii) any record of the minutes of meetings of the shareholders of a corporation, (iii) any record of a corporation containing details with respect to the ownership of the shares of the capital stock of the corporation and any transfers thereof, (iv) the general ledger or other book of final entry containing the summaries of the year-to-year transactions of a corporation, and any special contracts or agreements necessary to an understanding of the entries in the general ledger or other book of final entry referred to in subparagraph (iv), (v) The period ending on the day that is two years after the day that the corporation is dissolved.</p>



Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 38	Taxpayer Records	<i>Income Tax Act, RSC, 1985, c. 1 (5th Supp.), s. 230</i>	Event + 6 years (Event = End of last taxation year to which records and books of account relate, or year return filed, as long as no other exceptions apply)
Fed. 39	Proceedings Where No Limitation Period	<i>Limitations Act, 2002, S.O. 2002, c. 24, Schedule B, s. 16(1); as am. S.O. 2007, c. 13, s. 44; ss. 16(4), 17; as am. S.O. 2010, c. 1, Schedule 14, s. 1 ; as am. S.O. 2016, c. 2, Schedule 2, s. 4; as am. S.O. 2017, c. 2, Schedule 5, s. 14(1)</i>	Event = There is no limitation period for <ul style="list-style-type: none"> <li>- Environmental Claims not discovered</li> <li>- sexual assault or sexual misconduct proceedings</li> <li>- proceedings with no consequential relief or to enforce a court order</li> <li>- arbitration act or civil remedies act proceeding</li> <li>- proceeding with collateral</li> </ul>
Fed. 40	Charity and Non-Profit Rebates — Limitation Period	<i>Excise Tax Act, RSC 1985, c. E-15, ss. 259.(5),(5.1)</i>	Event + 4 years (Event = Where person is registrant, day person required to file return and where person not registrant, last day of period, or end of particular claim period; as applicable)
Fed. 41	FHR-CPP-9— Offence Prosecutions— Limitation Period	<i>Canada Pension Plan, RSC 1985, c. C-8, s. 103.(1)</i>	Event + 5 years (Event = Time subject matter of prosecution arose)
Fed. 42	Environmental Emergency E2 Plan Documents	Implementation Guidelines for the Environmental Emergency Regulations 2011, under the <i>Canadian Environmental Protection Act, 1999</i> , Minister of the Environment, 2011, s. 5.4	5 years; available at workplace

Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 43	Environmental Emergency Plan E2 Plan Annual Testing Records	Implementation Guidelines for the Environmental Emergency Regulations 2011, under the <i>Canadian Environmental Protection Act, 1999</i> , Minister of the Environment, 2011, s. 5.3 par. 1	5 years
Fed. 44	Environmental Emergency Plans and Record of Results from Annual Updates/Tests	Environmental Emergency Regulations, under the <i>Canadian Environmental Protection Act, 1999</i> , SOR/2003-307, s. 5.(1); s.6	5 years
Fed. 45	Determination made by an Accredited Laboratory Reports	Wastewater Systems Effluent Regulations, under the <i>Fisheries Act</i> , SOR/2012-139, ss. 17, 22	Event + 5 years (Event = Day report made; or decommissioned; as applicable)
Fed. 46	Wastewater System Combined Sewer Overflow Reports	Wastewater Systems Effluent Regulations, under the <i>Fisheries Act</i> , SOR/2012-139, ss. 19, 21, 22(1)	Event + 5 years (Event = Report made)
Fed. 47	Wastewater System Identification Reports	Wastewater Systems Effluent Regulations, under the <i>Fisheries Act</i> , SOR/2012-139, ss. 18(1), (2), (4) to (7), 21, 22(3)	Event + 5 years (Event = Wastewater system decommissioned)
Fed. 48	Wastewater System Monitoring Reports	Wastewater Systems Effluent Regulations, under the <i>Fisheries Act</i> , SOR/2012-139, ss. 19, 21, 22(1)	Event + 5 years (Event = Report made)

Citation Table No.	Subject Matter	Federal Citations	Retention Requirement or Limitation Period
Fed. 49	Wastewater System— Wastewater Systems Effluent Information Records	Wastewater Systems Effluent Regulations, under the <i>Fisheries Act</i> , SOR/2012-139, ss. 17, 21, 22	Event + 5 years (Event = Day record or report made; or: or day equipment ceased to be used; or decommissioned; as applicable; at wastewater system or in Canada)

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**Board Meeting, April 26, 2023**

# Directive 24 - Employment Systems Review – Final Report

**Strategic Alignment:**

Accountability  
Service Delivery and Enhancement  
Leadership and Capacity Building

**Report Type:**

For Information

Prepared by: *Jaspal Gill, Associate Director, Operations and Equity of Access*  
*Masuma Khangura, Executive Officer, Human Resources Partnerships*  
*and Equity*

Submitted by: *Rashmi Swarup, Director of Education*

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## Overview

### Objective:

To submit a final consultant's report on the completion of the Employment System review in accordance with Directive 24.

### Context:

The Board shall retain an independent expert to conduct a comprehensive employment Systems review (ESR), including a review of the implementation of the recommendations of the 2013 Turner Consulting Group Research Report on "Hiring and Promotion at the Peel District School Board.

### Timeline

Date	Action	Status
By June 1, 2020	Submit confirmation that expert has been retained.	Completed
By September 30, 2020	Submit confirmation that the board's ESR committee is in place and a copy of the Terms of Reference.	Completed
By January 31, 2021	Submit preliminary report, prepared and signed by the expert, which much include a review of the board's existing workforce data set and recommendations on whether to update the data or conduct a new census.	Completed and reported in January 25 <sup>th</sup> Board Report
By June 30, 2021	and every six months thereafter until the ESR is complete: submit a progress report prepared and signed by the expert.	Completed and reported in December 2021
March 2022 – September 2022	Collection of staff feedback (survey, focus groups, 1:1)	Completed
January – February 2023	Draft report shared with the Advisory and Reference Committee. Feedback complete.	Completed
April 26, 2023	Turner Consulting has completed the ESR and the Executive Summary is attached for review.	Submission of the ESR Executive Summary Report.

An Employment Systems Review (ESR) consists of an assessment of the structures/policies/procedures associated with employment and promotion within an organization, a consideration of how these elements are supportive of some identified groups compared to

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other groups, an analysis of barriers to groups, and recommendations for remediating barriers along with metrics to assess the success of the employer moving forward.

### **Consultants Review and Progress**

An ESR committee was established in May 2020, comprised of twenty-nine (29) members, representing a cross section of staff including Unions, Federations, Associations and Employee Resource Groups (ERG). On June 2, 2020, Turner Consulting was awarded the contract as the independent expert to complete the ERG. An initial meeting was held with ESR committee members and Tana Turner on June 25, 2020, where Ms. Turner shared the methodology of the ESR, the project work plan and scope as well as the possible committee structure to move the work forward.

1. At the November 10, 2020, meeting of the Board, a report was submitted which provided an update to ESR Committee design and also included the ESR terms of reference. Between December 14, 2020, and January 8, 2021, ESR committee members received three half-days of training in anti-oppression.
2. At the January 25, 2021, meeting of the Board, a report was submitted that detailed Ms. Turner's review of the Board's Workforce Census, which had been conducted in 2016. In that report, Ms. Turner reviewed the methodology, the tool, and the findings report that resulted. The report recommended that another workforce census be conducted with a specific focus on representation of Indigenous peoples and members of equity-seeking groups, their employment in the Board and also barriers that may exist for these groups for hiring and advancement. The report further advised that a 100% response rate should be sought, asserting that an 80% response rate is needed for adequate validity of findings.
3. February 23, 2021, the Consultant submitted a revised work plan of the Review with key dates, milestones, and reporting.
4. April 7, 2021, The Consultant met with the Reference Committee comprised of Peel Association of African Canadian Educators/Employees (PAACE), Union/Federations, other representatives, and Senior members from internal departments within the PDSB. Relevant materials referenced at the meeting were shared with the members in advance of the meeting. The Consultant chaired the meeting and discussed the following items with the committee. She provided role clarity and sought feedback and input from the committee members.
  - Scope of Work - ESR
  - ESR - Terms of Reference
  - Role of Reference Committee, Advisory Committee and Project Support Group
  - Revised Workplan
  - Overview of ESR and Methodology
  - Review of Journey Ahead Implementation: Discussion and Feedback – The consultant conducted meetings with HR staff responsible for the implementation of the 2013, Journey Ahead recommendations, focus group meetings with members of the Journey Ahead Steering Committee.

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5. May 5, 2021, the Consultant met with the ESR Advisory Committee. The group comprises of the Employee Resource Groups (ERGs), a community member representing disabled persons, and members from internal departments within the PDSB. The Consultant chaired the meeting. The relevant materials referenced in the meeting were shared with the members in advance of the meeting date. The Consultant reviewed the 2013, Journey Ahead Report and the Action Plan. The Consultant discussed each pillar supporting the Action Plan and sought feedback from the group.
  6. In July 2021, the Consultant reviewed the 2013, Journey Ahead implementation and it was agreed that this work overlaps with the ESR review and a decision was made to include the Journey Ahead review as part of the ESR. This has impacted the timelines, and a revised timeline was submitted by the Consultant.
  7. The Consultant engaged in collecting feedback from the PDSB employees via surveys, focus group discussions and one on one meetings with relevant staff between Spring of 2022 to Summer 2022. The Consultant then compiled the data into a draft report including observations and recommendations.
  8. The Consultant presented the draft report for review to the two (2) committees in the month of January 2023. The committees had a month to review and provide input to the consultant. Thereafter, the consultant compiled the final ESR report.

**Next Steps:**

1. Project has concluded and the Executive Summary is presented to the Board for review and receipt.
2. HR will review the report and formulate a project plan for the implementation of the recommendations in the ESR.
3. The recommendations from the ESR report will assist with the framing of the PDSB's Equity and Fairness in Employment Strategy.

**References:**

1. ESR Terms of Reference
2. Journey Ahead Report 2013

## Appendices

Turner Consulting Employment Systems Review Executive Summary Report



# PDSB

## Employment Systems Review



March 2023



# Executive Summary

In 2020, the Minister of Education released the reviewer’s report on the Peel District School Board (PDSB, the Board). This report documented observations and made recommendations with respect to systemic racism in the areas of human resources practices, board leadership, and governance at the PDSB. Based on the report and recommendations, the Minister of Education issued 27 binding Directives to the Board. This Employment Systems Review (ESR) was conducted in response to Ministry Directive 24, which states the following:

The Board shall retain an independent expert to conduct a comprehensive employment systems review (ESR), including a review of the implementation of the recommendations of the 2013 Turner Consulting Group Research Report on “Hiring and Promotion at the Peel District School Board.”

Turner Consulting Group was contracted by the PDSB to conduct this ESR.

## Methodology for the Employment Systems Review

This report is the product of the consulting team’s review and analysis of the Board’s employment policies and practices as well as employee perceptions and experiences. The aim of the ESR was to identify and make recommendations for the elimination of systemic, cultural, and attitudinal barriers to a diverse workforce, equitable employment policies and practices, and an inclusive workplace.

While the consulting team was open to exploring any issue of equity that arose in the course of conducting this review, the research inquiry was focused on issues affecting the groups that have been identified as experiencing persistent and systemic discrimination in the labour market, namely Indigenous peoples, racialized people, persons with disabilities, women, and those who identify as 2SLGBTQ+ (referred to as “Indigenous peoples and the equity-seeking groups” in this report).<sup>1</sup> While the report focuses on these groups, it is important to note that the removal of barriers to the hiring, advancement, and full inclusion of these groups also benefits all employees and offers advantages to the organization as a whole through improved productivity, effectiveness, and responsiveness to the community served.

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<sup>1</sup> See *Equality in Employment: A Royal Commission Report* by Judge Rosalie Abella. Released in 1984, this landmark report recommended enactment of employment equity as a government intervention to address the magnitude of systemic discrimination faced by Indigenous peoples, racialized people, persons with disabilities, and women.

The ESR blends the analysis of both qualitative and quantitative data collected through the following methods:

- Review of employment policies, written procedures, and related documents
- Review of 28 files for competitions conducted between 2020 and 2021 to assess how policies are implemented and to identify informal practices
- 27 focus groups in which 234 employees participated
- An online Workplace Equity and Inclusion Survey, distributed to all employees via email, in which 1,286 employees participated
- One-on-one interviews with senior leaders and union representatives
- Focus groups with Human Resources staff.

In total, about 1,500 employees participated in these consultations, representing about 8% of the Board's approximately 20,000 permanent employees. This level of participation gave us sufficient data to identify workplace issues and make recommendations for change. However, it did not allow us to identify all issues in all work locations of such a large and geographically dispersed organization.

While we have conducted a thorough review of the PDSB's employment systems for both academic and business employees, this review does not purport to be a comprehensive assessment of all the practices used by the hundreds of school administrators and managers responsible for hiring and managing employees throughout the Board's hundreds of worksites. Instead, this ESR provides a high-level perspective on the policies, practices, and organizational culture of the Board and their impact on employees.

## Key Priority Areas

In response to the issues and gaps identified through this review, recommendations are made throughout the report in four key priority areas.

### **Priority 1: Strengthen the employment equity infrastructure**

Despite having a Manager of Workplace Equity for the past 10 years, the PDSB does not have the employment equity infrastructure and maturity that one would expect. Specifically, the consultants did not find evidence of a strong policy framework, an Employment Equity Strategy, equity embedded within human resources practices, a solid understanding of workplace equity among employees, and so on. While *The Journey Ahead Research Report* was released in 2013, and was intended to be the starting point for the Board's workplace equity journey, it appears that the Board's focus was on implementing the actions from the report rather than changing the organization's hiring and promotion policies and practices. While some changes have been made to the Board's hiring practices, Human Resources staff shared with us that they have not yet been given the training and support that they want and need to be able to embed equity into their work.

The result is that a decade after *The Journey Ahead* report, the PDSB remains at the beginning stages of a workplace equity, diversity, and inclusion program that is characterized by a reactive rather than proactive approach and a sole focus on diversity, with little attention being paid to equity and inclusion.

Because the Board does not have a more mature workplace equity, diversity, and inclusion program, its present focus is in response to the Ministry Directives, which focused on addressing racism, specifically anti-Black racism. This has left members of other equity-seeking groups concerned because they continue to experience harassment and discrimination that is not being addressed. The approach that has been taken has also generated and deepened resistance to this work rather than supporting an understanding and commitment to employment equity.

These circumstances also require that the Board's Workplace Equity Program be moved out of the Human Resources Department so that the program has the independence to undertake its work and ensure the implementation of the recommendations from this report.

## **Priority 2: Diversify the workforce at all levels**

Throughout the consultations, employees shared their concern that hiring and advancement at the PDSB continues to be relationship-based rather than skill-based. They shared that while Regulation 274 was intended to change this practice, it nevertheless continued. This means that not only is the Board not hiring the best candidates, but relationship-based hiring continues to limit the diversity of the organization. In addition, employees shared their concern that relationships impact more than just hiring; they also impact advancement opportunities as well as employees' working environments.

While efforts have been undertaken to prioritize the hiring of Indigenous and Black teachers and to incorporate an assessment of lived experience into the hiring process, little attempt has been made to create equitable hiring practices that remove barriers for all groups. A focus on lived experience does not support the hiring of staff from all backgrounds who have a demonstrated commitment to anti-racism/anti-oppression. The results of the recently completed Staff Census identified large gaps in representation that will require significant efforts to address in the coming years.

Given the issues identified with the Board's hiring practices, recommendations have been made to strengthen the hiring and promotion processes. In addition, in order to advance efforts to diversify the workforce, those involved in the hiring process must be supported to recognize and mitigate their unconscious biases and understand the value that diversity brings to the workplace and to students. They must also be provided with the tools, resources, and policies to ensure that hiring is not based on who you know, but what you know.

### **Priority 3: Create a more inclusive and welcoming work environment**

Indigenous employees and those from other identity groups report that PDSB workplaces are not always safe and welcoming environments. In particular, Indigenous and racialized employees spoke about facing daily experiences of inappropriate behaviours, interpersonal oppression, and microaggressions, which are ignored by leaders in the organization. In addition, those from other identity groups shared that the focus on racism, without an equal focus on other forms of oppression has enabled these other forms of oppression to flourish.

Employees also shared that some of their colleagues are openly hostile to the Board's equity, diversity, and inclusion efforts, which we saw evidence of during the consultation process for this ESR.

Given these findings, recommendations are made to support the PDSB in creating a more welcoming and inclusive work environment where staff have a better understanding of equity and are comfortable with and supportive of colleagues and students from diverse communities, backgrounds, and identities.

These efforts need to be championed and modelled by the Board's senior leaders and supported by mandatory training.

### **Priority 4: Create more equitable policies and practices**

The review of employment policies and the hiring process identified several areas that need to be addressed to strengthen policies and practices as well as to ensure compliance with the *Ontario Human Rights Code* and the *Accessibility for Ontarians with Disabilities Act*. This will support the PDSB to create equitable employment policies and processes that support the hiring, advancement, and full inclusion of a qualified and diverse workforce.

Reports from employees regarding the provision of accommodation to employees with disabilities and their issues with requesting and receiving accommodation indicate that a full review is warranted to ensure that the Board is meeting its duty to accommodate, short of undue hardship, under the *Ontario Human Rights Code*.

Addressing these issues is particularly important as the COVID-19 pandemic continues. Like employees in other professions, teachers have been experiencing burnout and leaving the profession over the past few years. The result is that Ontario has moved from having an oversupply of teachers to an undersupply, with boards across the province struggling to recruit and retain not only permanent contract teachers but also occasional teachers and others for critical school-based positions.

Given these challenges, the Board needs to foster psychologically safe and welcoming workplaces that do not worsen mental and physical health issues. In addition, the Board needs to focus on providing employees with the needed accommodation that keeps them at work rather than forcing employees to take

a medical leave of absence. Bringing about this change requires a change in the Board's approach to Human Resources management and a change in the Board's attitude toward employees—something employees identified as foundational to many of the Board's workplace issues. Employees shared that they are seen as disposable and easily replaceable and that their requests for accommodations are seen as attempts to avoid work.

As the pandemic continues, the role of the Human Resources Department has increased in importance. While many school boards have focused on the impact of the pandemic on students, the PDSB must ensure that it also pays attention to the impact of the pandemic on employees if it is to ensure that it has sufficient and capable staff to support the learning and well-being of students.

**Board Meeting, April 26, 2023**

# Suspension, Expulsion, Safe Schools Incident Reports and Employee Workplace Violence Reports Data

**Strategic Alignment:**

Policy 48 Safe and Caring Schools  
Ministry Directives 21 and 22

**Report Type:** For Information

*Prepared by:* Harjit Aujla, Associate Director, School Improvement and Equity

*Submitted by:* Rashmi Swarup, Director of Education

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## Overview

### **Objective:**

To provide information and data on school suspensions, expulsions, and incidents of school violence.

### **Highlights:**

- Secondary expulsion data has increased in the current school year;
- Data for the 2019-2020, 2020-2021 and 2021-2022 school years were impacted by the Covid 19 Pandemic (COVID);
- 2022-2023 data were measured against pre-Covid data in 2018-2019;
- The number of Safe Schools Incident Reports has decreased slightly since pre-Covid data;
- The number of Employee Violent Incidents Reports is consistent with pre-Covid data.

### **Background:**

The Peel District School Board continues to collect and monitor suspension and expulsion data, and incidents of violence.

In accordance with Section 300.2 of Part XII of the *Education Act*, an employee of the board who becomes aware that a student at a school of the board may have engaged in an incident for which suspension or expulsion must be considered, the employee shall report the incident to the principal as soon as reasonably possible. The employee must consider the safety of others and the urgency of the situation in reporting the incident. An oral report may be made, however, a written report must be done through the **Safe School Incident Report**.

An **Employee Workplace Violence Report** is submitted when a student exercised, attempted or threatened use of physical force against a staff member while at work. The definition of workplace violence is “the exercise, an attempt to exercise, or a statement or behaviour that is reasonable for a worker to interpret as a threat to exercise physical force against a worker that could cause physical injury to the worker.”

As per PPM 120, a **violent incident** is defined as “the occurrence of any one of the following or the occurrence of a combination of any of the following: possessing a weapon, including possessing a firearm, physical assault causing bodily harm requiring medical treatment, sexual assault, robbery, using a weapon to cause or threaten bodily harm to another person, extortion, and hate and/or bias motivated activity.”

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# Evidence

## **Suspension/ Expulsion**

A suspension can range from one to twenty school days, with more than five days representing a long-term suspension. Expelled students are removed from school for an indefinite period of time. They can be expelled from their own school or from all schools in their school board. The most recent suspension and expulsion data for the current school year is included below.

For the data collected for years 2020-2021, and 2021-2022, it is important to note that students were engaged in three learning modes: in-person, online and hybrid.

### **Suspensions**

Elementary school suspensions	
Year	Suspensions
2018-2019 school year	1230
2019-2020 school year	771
2020-2021 school year	415
2021-2022 school year	142
September 2022-March 10, 2023	323

Secondary school suspensions	
Year	Suspensions
2018-2019 school year	2866
2019-2020 school year	1881
2020-2021 school year	89
2021-2022 school year	609
September 2022-March 10, 2023	797

### **Expulsions**

Elementary school expulsions	
Year	Expulsion
2018-2019 school year	0
2019-2020 school year	0
2020-2021 school year	0
2021-2022 school year	1
September 2022-March 10, 2023	0



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Secondary school expulsions	
Year	Expulsion
2018-2019 school year	2
2019-2020 school year	3
2020-2021 school year	1
2021-2022 school year	12
September 2022-March 10, 2023	17

### **Employee Workplace Violence Report**

The *Occupational Health and Safety Act* (“OHSA” or the “Act”) outlines the roles, rights, and responsibilities of employers, supervisors, and workers to make Ontario’s workplaces safe and healthy. Workers who see a safety hazard or a breach of the OHSA in the workplace are obligated to report the situation to their employer or supervisor who, in turn, is required to address those situations.

In situations of workplace violence, as defined by the OHSA, workers are required to report all incidents regardless of any mitigating factors. Workplace violence may include scratching or pinching a worker, throwing of objects, such as a toy at a worker, sexual violence, or threats, whether conveyed verbally, in writing, or through behaviour. All reported incidents are investigated by supervisors to prevent recurrence. One person may generate multiple workplace violence forms from multiple staff, (in some cases daily or weekly) if a behaviour meeting the definition under the Act is ongoing. The board has procedures and supports in place to promote positive student behaviour and student achievement.

**Safety Plan:** Safety plans are an emergency response plan for staff. They provide direction to staff to ensure student and staff safety. They describe observable student behaviour so staff may recognize escalating behaviour and early warning signs in order to implement appropriate interventions that deescalate challenging behaviour.

<b>Types of Violence Breakdown (2020-2023)</b>				
<b>Year</b>	<b>Types of Violence</b>			<b>Total</b>
	<b>Violent (a): Exercise of Physical Force</b>	<b>Violent (b): Attempt to Exercise Physical Force</b>	<b>Violent (c): Threat to Exercise Physical Force</b>	
<b>2018-2019</b>	10 (29%)	6 (17%)	18 (53%)	34
<b>2019-2020</b>	2635 (85%)	283 (9%)	198 (6%)	3116
<b>2020-2021</b>	1052 (85%)	117 (9%)	71 (6%)	1240
<b>2021-2022</b>	2438 (86%)	198 (7%)	132 (5%)	2768
<b>2022-2023</b>	2885 (86%)	255 (8%)	146 (4%)	3286

<b>Safety Plan Breakdown</b>			
<b>Year</b>	<b>Is there a Safety Plan in Place?</b>		
	<b>No</b>	<b>Unknown</b>	<b>Yes</b>
<b>2018-2019</b>	3	12	9
<b>2019-2020</b>	701	390	2025
<b>2020-2021</b>	346	183	711
<b>2021-2022</b>	1061	440	1267
<b>2022-2023</b>	1462	530	1294

## Safe Schools Incident Report

In accordance with the *Education Act*, an employee of the board who becomes aware that a student at a school of the board may have engaged in an incident for which suspension or expulsion may be considered, must report the matter to the principal. Reporting of incidents by board employees must be done fairly, and without prejudice, bias or favouritism towards or against any student based on protected grounds of discrimination under the *Ontario Human Rights Code* or for any other reason. One incident may generate multiple reports.

Year over Year Comparison of Employee Group Affected (September 1, 2020 - March 10, 2023)

Year	Employee Group													
	Admin.	CUPE: CUPE 2544	ETFO: ETFO- PEOT	ETFO: ETFO- PETL	Lunchroom Supervisor	OPSEU: OPSEU 2100	OPSEU: OPSEU 283	OPSEU: OPSEU 292	OSSTF: OSSTF	OSSTF: OSSTF - OT	OSSTF: PSSP	School Monitor	CUPE: CUPE 1628	Total
2018-2019		4	9	10		6	1			3				
2019-2020	92	3	97	945	14	1518	8	2	220	30	1	2	5	2940
2020-2021	22	1	34	192	4	421	6	6	58	16	0	1	0	761
2021-2022	98	1	77	839	16	914	2	1	302	39	6	0	8	2303
2022-2023	98	0	105	1248	20	933	1	1	333	37	0	1	12	2789

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## **Findings/ Key Considerations:**

In the Ministry Review of the PDSB, the data revealed that approximately 78% of the PDSB's secondary school suspensions did not fit the parameters of the Ministry of Education's definitions for suspension between 2013 and 2019. Approximately 40% of the PDSB's suspensions of elementary students did not fit within the parameters of the Ministry of Education's definitions of suspensions and expulsions between 2013 and 2019. As per Directive 21 in the Ministry Review of the PDSB, administrators were trained to accurately characterize student infractions using S. 306 and 310 of the *Education Act*. This misuse of the "Other" category has been eliminated.

In alignment with Policy 48 Safe and Caring Schools, the Safe and Caring Schools department will have trained all administrators on Directive 21, Policy 48, Restorative Justice and Procedural Fairness by June 2023. Additionally, the 3<sup>rd</sup> module of Policy 48 focuses solely on progressive discipline, highlighting a continuum of interventions and strategies that promote positive behaviour. These interventions and strategies have supports and consequences that are not punitive but rather corrective and supportive. Additionally, Policy 48 has mandated the use of a Principal's Analysis of Incident Report (PAIR) as a frame to conduct school investigations into alleged behaviour. The PAIR requires principals to interrogate their bias, social location and identity and to purposefully consider the identity and lived experiences of the student(s) involved in an incident.

The Board has provided mandatory professional learning for all administrators on Safe and Caring Schools Policy 48, including Mitigating and Other factors. The Board has ensured that administrators have the requisite skills to allow them to consider Mitigating and Other factors in making decisions about student discipline. For example, Mitigating and Other factors include considering a student's age, history and special education status.

## Impact Analysis

### **Equity & Human Rights Review:**

This reports affirms the need to continue our work around progressive discipline, restorative justice, and culturally relevant and responsive, inclusive learning environments.

A Board wide commitment to a culture of equity, student well-being and achievement is essential for realizing success.

Employees are required to follow the Board's Human Rights, Anti-Racism and Equity policies, in addition to the newly revised Safe and Caring Schools Policy 48. This will create learning environments that are equitable, inclusive and free from discrimination. This is in alignment with the Board Improvement and Equity Plan which seeks to ensure anti-racist, anti-oppressive and anti-colonial safe teaching and learning environments.

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**Board or Ministry Policy Alignment:**

The purpose and principles in this report are in alignment with Safe and Caring Schools Policy 48.

**Resources:**

The Safe and Caring Schools department will continue to provide resources and training to all school leaders around conducting procedurally fair school investigations, and prioritizing Restorative Justice in schools through learning and site specific supports. The department will continue to support Safe and Accepting School teams with the development, implementation and deepening of the Bullying Prevention and Intervention Plans, in accordance with Policy 48- Safe and Caring Schools. Newly appointed administrators will also receive training.

**Legal implications:**

This work ensures ongoing compliance with Policy 48 Safe and Caring Schools, and upholds the board's legal obligations while minimizing its reputational risk, by administering fair and just disciplinary processes through an anti-racist anti-oppressive approach. Suspensions and expulsions may negatively impact student achievement. This work is critical in ensuring positive outcomes and experiences for students.

**Risk Assessment:**

The work of the Safe and Caring Schools department is critical to ensure ongoing compliance with Policy 48- Safe and Caring Schools. Monitoring suspension and expulsion data helps determine the degree to which reforms in the student discipline process have been successful. Ongoing training provided to PDSB staff helps schools to uphold safe and caring learning environments in which all students flourish.

**Community Impact:**

The Board remains committed to ensuring safe, inclusive and equitable learning environments for all students by encouraging positive behaviour and reducing incidents for which suspension/expulsion may be considered. When students feel valued and affirmed, and are in learning spaces that are engaging and allow them to access learning, incidents of behaviour requiring an Employee Workplace Violent Incident and/or an Safe Schools Incident Report will be reduced.

## Next Steps

**Action Required:**

The Safe and Caring Schools department will provide an update to the Board of Trustees biannually, in January and in June.

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**Success Measures:**

- All school leaders will have completed three modules of Policy 48 training and four modules of and restorative justice training by June, 2023.
- Increased school understanding and use of progressive discipline and restorative approaches to student discipline.
- Ensure accountability by continuing employee compliance to complete Employee Violence Incident Reports and Safe Schools Incident Reports to monitor data.

**References:**

Policy 48 - Safe and Caring Schools Policy

## 15.4

**Board Meeting, April 26, 2023**

# Recommended Candidate for Special Education Advisory Committee (SEAC) Vacant Member Seat

**Strategic Alignment:**

PDSB Black Student Success Strategy 2.0  
Ministry Directive #14  
The *Education Act*, Regulation 464/97

**Report Type:**

Recommendation

<i>Prepared by:</i>	Jennifer Newby, Superintendent, Special Education, Social Emotional Learning and Well-being Paul da Silva, Associate Director, School Improvement and Equity
<i>Submitted by:</i>	Rashmi Swarup, Director of Education

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## Overview

### **Recommendation:**

That the Sawubona Africentric Circle of Support be appointed to fill the member organization vacancy on the Special Education Advisory Committee.

### **Highlights:**

- The Special Education Advisory Committee (SEAC) is a statutory committee of the Board, providing advice about special education programs and services available to PDSB students.
- In the spring of 2022, one of the 12 committee member seats became vacant and a call out for a new member organization was issued in February of 2023.
- Sawubona Africentric Circle of Support is the recommended candidate for inclusion on the Peel District School Board Special Education Advisory Committee as a qualified member.
- Sawubona supports Black caregivers of children and adults with a disability, providing the families with a safe place to network, build connections, problem-solve, and share resources as part of a learning community.
- Sawubona also supports families that are new to Canada and guides families in various areas including recommendations for respite services; post 21 employment and entrepreneurial opportunities.
- Sawubona maintains positive and productive working relationships with school boards including Durham District Public and Catholic Boards and Toronto District School Board providing parents and staff with information to both enlighten and empower.

### **Background:**

SEAC is a statutory committee of the Board, providing advice about special education programs and services available to PDSB students. It provides an opportunity to engage with the community organizations that work in collaboration with the Board, bringing forward an essential perspective on a variety of matters pertaining to the delivery of Special Education Services. SEAC representative organizations may also serve as a voice for parents, providing an additional route for communication and collaboration within the PDSB education community.

The committee includes up to 12 members from qualified organizations or associations. In the spring of 2022, one of the 12 committee member seats became vacant and a call out for a new member organization was issued in February of 2023.

The call out was shared on the Board website and social media sites and was active for 4 weeks.



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## Evidence

### **Findings/Key Considerations:**

Submissions were evaluated based on the requirements communicated in the call out including:

- Being an incorporated organization
- operating throughout Ontario
- furthering the interests and well-being of one or more groups of exceptional children or adults
- not representing professional educators

Submissions were also evaluated based on alignment with strategic priorities within the Board and within the Special Education and Social Emotional Learning department.

Peel District School Board is committed to maintaining and enhancing community partnerships that support all students, particularly Black students, and students with disabilities. The Annual Equity Report Card produced in compliance with Ministry Directive 9 states the following:

“Absenteeism is almost twice as high among some marginalized groups. African, Black, and Afro-Caribbean, Indigenous, Latinx/Hispanic and Middle Eastern students experience higher instances of absenteeism compared to other students, suggesting that schools may not be places where they feel safe and/or offer a sense of belonging. (Curry-Stevens & Kim-Gervey, 2016).”

The mandate of Sawubona Africentric Circle of Support includes educating families on their rights and responsibilities; enlightening them about services available to them and empowering them to advocate in ways that can improve the overall wellbeing and sense of belonging of black students- particularly those with disabilities within the school system.

Given the intersectionality of race and disability and its impact on students, the inclusion of an organization at SEAC that can speak to both areas (race and disability) is in line with the guiding principles of the Black Student Success Strategy. Specifically, the recognition that the “Education System is Not Neutral” and “System Transformation Requires Community Voice”.

## Impact Analysis

### **Equity and Human Rights**

As stated in Policy 51 - Human Rights “PDSB is committed to providing an inclusive learning and working environment that is free from discrimination contrary to the Ontario Human Rights Code (the “Code”) through appropriate responses to discrimination and proactive steps to actively encourage and foster a culture of respect, dignity, and inherent worth for all people and communities and PDSB and around the world.”

Inclusion of Sawubona Africentric Circle of Support on Peel SEAC is a proactive step towards fostering a culture of respect and dignity for a group that has been historically underserved within the education system.

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Furthering the interests and wellbeing of students with disabilities can be supported by through the involvement of an organization that promotes the “It takes a Village” approach to consultation and partnership. Diversity and representation are strengths. This diversity includes not only diversity of race but of ideas and ways of approaching relationships with communities of colour and “supporting Black and Brown people’s influential presence by providing them with a seat at the table.” as described by author Decoteau J. Irby in the book *Stuck Improving*.

Universal Design for Learning has been a consistent tenant of special education support service models because it is predicated on the idea that when essential interventions are provided for some, all students can benefit. Similarly, the consultation and recommendations put forth by the Special Education Advisory Committee would now include the lived experience of black families, providing valuable insight into the work of the Board.

### **Board or Ministry Policy Alignment**

This recommendation aligns with the following Ministry and Board Policies:

Ontario Education Act Regulation 464/97 Special Education Advisory Committee

Anti-Racism Policy

Policy 51: Human Rights

Policy 54: Equity and Inclusive Education

### **Resource/Financial Implications**

There are no financial implications.

### **Legal Implications/ Risk Assessment**

There are no legal implications or risks associated with this recommendation.

### **Community Impact:**

Within Peel, the commitment to create more Black Parent Associations within schools and families of schools would be bolstered by the Boards demonstrated commitment to this principle with the inclusion of Sawubona, an established parent group, within the SEAC committee roster. This aligns with Policy 54 – Equity and Inclusive Education which describes the Board’s commitment to establishing and maintaining partnerships with diverse communities as part of a broader commitment to include and recognize the perspectives and experiences of all students and to ensure that their needs are met.

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## Next Steps

### **Action Required:**

Should the recommended candidate be confirmed, they will be contacted via phone, email, or paper correspondence and invited to attend upcoming SEAC meetings as a qualified member.

### **Communications:**

There will be communication with the SEAC chair and existing committee members to inform them of the new organization. The new organization will also be listed in the updated SEAC brochure to be distributed to the system and added to all SEAC related correspondence.

### **References:**

PDSB Black Student Success Strategy 2.0

Ministry of Education Review of the Peel District School Board

Stuck Improving, Decoteau J. Irby

## Appendices

Appendix 1 – Special Education Advisory Association List 2022-2026

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**SPECIAL EDUCATION ADVISORY ASSOCIATION LIST  
2022-2026**

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Association for Bright Children, Peel Chapter

Autism Ontario Peel Chapter

Brampton Caledon Community Living

Canadian Mental Health Association/Peel Branch

Down Syndrome Association of Peel

Easter Seals Ontario

FASworld Canada – Peel Chapter

Fragile X Research Foundation of Canada

Learning Disabilities Association of Peel Region

OPVIC – Ontario Parents of Visually Impaired Ch Children

VOICE for Deaf and Hard of Hearing Children

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## **Notice of Motion/Motion**

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**Submitted by:**

**Moved by:**

**Seconded by:**

That two Trustees be appointed to serve on the Ontario Public School Board Association (OPSBA) Board of Directors for a term beginning in June 2023 until June 2024, or until a successor is appointed;

And further, that two Trustees be appointed to serve as Alternates on the OPSBA Board of Directors for a term beginning in June 2023 until June 2024, or until a successor is appointed.

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