Governance and Policy Committee Meeting

AGENDA

Wednesday, April 12, 2023

OPEN SESSION   Hybrid Meeting, 6:30 p.m.

Committee Members:

B. MacDonald (Committee Chair)
L. Alves (Committee Vice-Chair)
K. Bailey
S. Benjamin
J. Clark
K. McDonald

D. Green (Ex-officio)
L. Cole (Ex-officio)

OPEN SESSION

1. **Call to Order**

2. **Acknowledgement of Traditional Lands**

3. **Approval of Agenda**

4. **Declarations of Conflict of Interest**

5. **Approval of Minutes**

    5.1. Governance and Policy Committee Meeting, March 7, 2023

6. **Delegations**

7. **Staff Reports**

    7.1. Repeal of Policy 3 – Appointment of Administrative and Supervisory Personnel
    7.2. Naming and Renaming of Schools, Special Function Areas, and Facilities Policy, Update #4
    7.3. Student Registration and Admission Policy
    7.4. Artificial Intelligence and Plagiarism (For information)
    7.5. Identity-Based Data Collection Policy (For information)
    7.6. Policy Management Program Update (For information)
    7.7. Records Retention Schedule

8. **Communications**

9. **Trustee Motions for Consideration**

10. Trustee Notices of Motion

11. Adjournment

PEEL DISTRICT SCHOOL BOARD

Minutes of a meeting of the Governance and Policy Committee of the Peel District School Board, held on Tuesday, March 7, 2023, at 17:30 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: Also present:

    Brad MacDonald, Chair   Stan Cameron
    Lucas Alves, Vice-Chair   Will Davies
    Karla Bailey
    Susan Benjamin
    David Green, Board Chair (electronic)
    Kathy McDonald (electronic)

Member absent:

    Jeffrey Clark

Administration:

    Kathryn Lockyer, General Counsel and Governance Officer (Executive Member)
    Donna Ford, Superintendent of Education
    Rasulan Hoppie, Superintendent, Curriculum, Instruction and Assessment

    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**

   Item 5.1, Minutes of the Governance and Policy Committee Meeting, held January 18, 2023, was reordered to facilitate a member's presence.

   GC-10   Moved by Susan Benjamin
                  Seconded by Karla Bailey

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

                                   .... carried
                                   2/3rds' majority

4.   Conflict of Interest

There were no declarations of conflict of interest.

5.   Supporting Students with Prevalent Medical Conditions Policy

Reviewing the report, Senior Manager (Acting), Social Emotional Learning, Janet Jackowski, noted that the Ministry of Education expects all school boards to develop and maintain a policy to support students with prevalent medical conditions. Providing examples of prevalent medical conditions, she indicated that these conditions have the potential to result in a medical incident or a life-threatening medical emergency. Janet Jackowski stated that the Policy was drafted through internal consultation and in accordance with the Education Act, PPM 161, Ryan's Law, Sabrina's Law, related legislation, and Board policies and procedures. She highlighted the purpose of the draft Policy, and noted that it sets the requirements for collection of personal information, plans of care, supporting daily or routine management, independent management, emergency response, partnership with stakeholders, therapy considerations, and liability protection. She explained that, following Board approval of the Policy, existing relevant guidelines for special education and social-emotional learning will be migrated to an operating procedure.

Janet Jackowski responded to questions of clarification including: registration form captures prevalent medical conditions from which plans of care are developed in consultation with the family and physician; existing plans of care will be followed until they are reviewed or updated; schools have generic plans of care and emergency plans; medical transportation requests are dealt with on a case by case basis; bus drivers are provided with a list of students and their prevalent medical conditions; bus operators provide training to their drivers on laws relevant to emergency medical conditions; staff members working with children are required to undertake mandatory training on Ryan's Law, Sabrina's Law, etc., and compliance is tracked; every school is required to have two staff qualified on first-aid; air quality standards are required to be met and medical conditions of students in classrooms do not infer a responsibility to provide above-standard air quality levels.

GC-11   Moved by Lucas Alves
             Seconded by Susan Benjamin

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

   That, the Supporting Students with Prevalent Medical Conditions Policy be approved.
   (APPENDIX I, Item 7.1 of the agenda)

                                                            .... carried

6.   Minutes of the Governance and Policy Committee Meeting, January 18, 2023

A member referred to Item 10.1, Artificial Intelligence (AI) and Plagiarism Policy, and noted the request for staff to bring a report on the status of such a policy in relation to artificially generated content via software. General Counsel and Governance Officer, Kathryn Lockyer, advised that this meeting was added to the regular schedule of Governance and Policy Committee meetings because of the requirement to bring forward a Concussion Prevention and Intervention Policy within legislated timelines. The staff report in response to a policy on AI and plagiarism will be brought to the next regularly scheduled Committee meeting in April 2023.

GC-12   Moved by Lucas Alves
             Seconded by Susan Benjamin

Resolved, that the Minutes of the Governance and Policy Committee Meeting, held January 18, 2023, be approved.

.... carried

7.   Concussion Prevention and Intervention Policy

Superintendent, Curriculum, Instruction and Assessment, Rasulan Hoppie, reviewed the highlights of the proposed policy, noting that the Board is committed to reducing the risk of injury and raising awareness of the signs, symptoms and management of concussions. The policy will apply to all employees, students, parents/guardians, coaches, team trainers, officials and volunteers, and all interschool activities whether on school site or off school site, intramural activities, self-injurious behaviours, as well as any activities where collisions can occur. Referring to relevant legislation and Ministry PPM158, Superintendent Hoppie stated that the Policy complies with legislation and best practices for concussion management, and reinforces the Board's obligation to the health, safety and well-being of students and staff.

In response to trustees' questions of clarification, Superintendent Hoppie stated that asphalt surfaces are safe for students to engage in various activities, and collisions and concussions can occur on any surface and in many situations. He spoke about training on prevention and safety measures, and conflict resolution strategies. Training on concussion prevention and intervention is provided through a series of mandatory online training modules to ensure staff are aware of instances of suspected concussion. The modules are updated on an as-needed basis, and comply with the minimum standards set by the Ministry and the Ontario Physical and Health Education Association. Superintendent Hoppie provided clarification regarding: all staff, including lunchroom supervisors, are required to be knowledgeable about this Policy; schools maintain information related to overall safety and well-being of students, and to ensure effective administration of the Policy and necessary steps taken for a student to resume regular activities after a concussion; no requirement to collate and report data on concussions. Superintendent Hoppie confirmed that he will discuss with administration the requests to share training modules with trustees, and for schools to track non-identifiable data on concussion incidents.

7. Concussion Prevention and Intervention Policy (Continued)

GC-13   Moved by Kathy McDonald
                   Seconded by Susan Benjamin

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

> That, the Concussion Prevention and Intervention Policy be approved, and replace existing Policy 84 – Concussion Prevention and Intervention. (APPENDIX II, Item 7.2 of the agenda)

.... carried

8. Information, Access and Privacy Policy

Privacy and Information Officer, Oriana Sharp, reported that the proposed Information, Access and Privacy Policy will replace Policy #88, Freedom of Information and Privacy. She noted the legislative obligations for school boards to provide access to records and protect the privacy of personal information, personal health information and confidential information. Referring to the Records Management and the Privacy Risk Audits undertaken by KPMG, she stated that the audits revealed gaps in training, communication and consistent practices in records management and privacy. Oriana Sharp advised that the proposed Information, Access and Privacy Policy will provide a more detailed framework for all levels of staff to handle requests for information and to protect the privacy and confidentiality of individuals.

Oriana Sharp and Kathryn Lockyer responded to members' questions of clarification, including: the proposed Policy adds details regarding privacy impact assessments, privacy breaches, and associated procedures; the new student information system will have an improved audit trail capability; the OSR Procedure, Retention Schedule and Handbook for superintendents, principals and office administration staff are being rolled out; schools will be encouraged to store paper records offsite with the Board-approved contractor; under the *Municipal Freedom of Information and Protection of Privacy Act,* PDSB's General Counsel is delegated Head to make access decisions and oversee administration of the legislation; personal information of trustees is in the custody or control of the Board is protected.

GC-14   Moved by Lucas Alves
                   Seconded by Karla Bailey

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

> That, the Information, Access and Privacy Policy be approved and replace Policy 88 – Freedom of Information and Privacy. (APPENDIX III, Item 7.3 of the agenda)

.... carried

9. Trustee Staff Relations Policy

General Counsel and Governance Officer, Kathryn Lockyer, stated that the above-noted draft Policy was discussed at the previous Committee meeting, and a recommendation was made that the Board approve the draft Policy being sent for review by the Ontario Public School Boards' Association. The recommendation was not approved by the Board.

Kathryn Lockyer stated that the draft Policy is brought back to the Committee for further consideration. The Committee did not support the administrative recommendation.

10. Adjournment

GC-15   Moved by Karla Bailey
             Seconded by Lucas Alves

Resolved, that the meeting adjourn (18:42 hours).

…………. carried

....… Chair

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

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

POLICIES AND REGULATIONS **Policy 3**

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.

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.

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

4.   <u>Assignment of Principals</u>

4.1   <u>New Schools</u>

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   <u>Established Schools</u>

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

5.   <u>Other Appointments</u>

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.   <u>Travelling and Moving Allowances: Relocation of Senior Supervisory Staff</u>

6.1   <u>Travelling Allowance</u>

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   <u>Moving Allowance</u>

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.

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

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

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:

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.

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

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.

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 reimaging 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.

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. 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 individuals, current PDSB employees or Board members.

b)   Names of corporations.

c)   Persons who are known to have championed or orchestrated the mechanisms (legislation, policies and practices of assimilation) of colonialism in Canada.

d)   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.

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.

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. Members of 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

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 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

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

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 reimaging 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

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

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.

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.

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

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

Prepared by:	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
Submitted by:	Rashmi Swarup, Director of Education

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:

- 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;

- 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

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 <u>that photocopies not be taken of student's personal or immigration documentation</u> (e.g. birth certificates, passports, visas). These documents should generally be presented as <u>originals</u> 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 <u>must be originals and must not be photocopied</u>. 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 of 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 Meeting, April 12, 2023

Artificial Intelligence and Plagiarism

Strategic Alignment:
Trustee Requested Staff Report

Report Type:
For Information

Prepared by:	LaShawn Murray, Policy Analyst
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Submitted by:	Rashmi Swarup, Director of Education

Overview

Objective:
To provide an overview of the recognition of Artificial Intelligence (AI) systems in any Peel District School Board (PDSB) policy regarding plagiarism.

Highlights:
- The evolution of Artificial Intelligence has brought forward concerns regarding its impact on education and specifically, plagiarism.
- The Student Assessment, Evaluation, and Reporting in Peel Elementary and Secondary Schools Policy, alongside the Student Code of Conduct, reference plagiarism and academic honesty but do not make an explicit reference to artificially generated content.
- This presents an opportunity for a new policy and/or a revision to existing policies and guidance documents that are responsive to the implications of Artificial Intelligence in education regarding plagiarism.

Background:
With the evolution of technology, societies are increasingly becoming more digital. Consequently, the adoption of Artificial Intelligence is continuously being integrated into everyday systems shaping human interactions across many industries from the interaction with chatbots to the use of voice assistants (e.g., Siri, Alexa) to personalized recommendations and enhancements to Google Maps. The recent launch of ChatGPT has brought to the forefront discussions on the disruption of AI systems, whether positive or negative, on the field of education. For students and educators, this reinforces the need to understand the potential of AI on education while developing an awareness of the risks and limitations of these systems, including their ability to uphold the PDSB's commitments to protection of privacy, equity, human rights, ethics, anti-oppression, and accessibility.

At the January 18, 2023, Governance and Policy Committee Meeting, the Committee discussed the emerging concern of artificially generated content and its implications on the definition of plagiarism. This report provides an overview on the status of Artificial Intelligence within PDSB policies regarding plagiarism.

Evidence

Findings/Key Considerations:

What is Artificial Intelligence?
As defined in the draft Bill C-27, a proposed federal Act to enact the Artificial Intelligence and Data Act, an artificial intelligence system is "a technological system that, autonomously or partly autonomously, processes data related to human activities through the use of a genetic algorithm, a neural network, machine learning or another technique in order to generate content or make decisions, recommendations or predictions" (Bill C-27, 2022, 39(2)). In other words, AI refers to computer systems that can imitate or execute tasks commonly requiring human intelligence including but not limited to reasoning, problem solving, making predictions, and producing creative work (European Union, 2022; Rekdal, 2023; UNESCO, 2019). ChatGPT is an example of generative AI, tools leveraging machine learning algorithms, trained on large

datasets, to generate new content including text (e.g., essays, poems, lessons), images, music, and audio (Iriondo, 2023; Rekdal, 2023; Routley, 2022).

Within education, artificial intelligence has the potential to augment the teaching and learning environment (European Union, 2022). In some research, AI systems have been conceptualized across four use cases:
- Using AI to teach students (Student Teaching)
- Using AI to support student learning (Student Supporting)
- Using AI to support the teacher (Teacher Supporting)
- Using AI to support system-wide planning (System Supporting)

(European Union, 2022, p. 14)

The intersection of AI and plagiarism in PDSB policies

Currently, the PDSB does not have a policy that exclusively addresses plagiarism. The Student Assessment, Evaluation and Reporting in Peel Elementary and Secondary Schools Policy features a section on academic honesty that outlines the responsibilities of educators and school teams to communicate expectations for original student content and provides guidance when responding to students who have plagiarized or cheated.

As stated within the Policy:

As demonstrated by PDSB's Character Attributes in Action, we expect all those in our learning community to act in an honest manner. Plagiarism is defined in Ministry policy as the use or close imitation of the language and thoughts of another without attribution, in order to represent them as one's own original work. School teams and teachers will make it clear to students that the evidence of learning provided must be their own and that cheating and plagiarism will not be condoned. School teams and teachers will address the prevention of cheating and plagiarizing by communicating to students and families the process of documentation to be used in the class, grade, and school. School teams and teachers may use whatever means of detecting cheating and plagiarism that best supports student achievement and success.

When responding to students who have plagiarized or cheated, teachers and school teams will use a clear procedure that considers four mitigating factors and an equity stance to learning and teaching when determining the appropriate outcomes and support for the student:
- the grade level of the student;
- the maturity of the student;
- the number and frequency of incidents; and/or
- the individual circumstances of the student.

(PDSB, 2018, p.10)

This Policy uses the Ministry of Education definition of plagiarism as found within the 2010 *Growing success: assessment, evaluation, and reporting in Ontario's schools, kindergarten to Grade 12* document.

The Digital Citizenship Policy requires students to demonstrate "digital citizenship through the appropriate use of technology, as outlined in schools' codes of conduct" (PDSB, 2013, p. 3). Plagiarism is referenced within the Student and School Code of Conduct. Herein, students commit to: "practice honesty and integrity including but not limited to: not participating in or

encouraging plagiarism, misrepresentation of original work, lying, cheating, theft of evaluation instruments, use of unauthorized aids or false representation of identity" (PDSB, 2023).

The use of artificially generated content without attribution or the representation of this 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. Nonetheless, the absence of an explicit and intentional reference to artificial intelligence and plagiarism is a noticeable gap within Board policies and presents an opportunity for the development of a new policy alongside revisions to existing PDSB policies and guidance documents. In addition, it can inform the review of the Student Assessment, Evaluation and Reporting in Peel Elementary and Secondary Schools Policy which is scheduled for the 2023 – 2024 school year.

Impact Analysis

Equity & Human Rights Review:

While AI can enhance the teaching and learning environment, it can also present risks including reinforcing or exacerbating biases and prejudices and compromising privacy. PDSB policies regarding artificial intelligence will need to establish guidance and expectations to ensure the educators, staff and students are engaging with AI systems in a responsible manner that upholds the PDSB's commitment to protection of privacy, equity, human rights, children's rights, ethics, anti-oppression, and accessibility. Policy development can be informed by resources including but not limited to:
- European Union's *Ethical guidelines on the use of artificial intelligence (AI) and data in teaching and learning for educators*
- UNESCO's *AI and education: Guidance for Policy-makers*
- UNICEF's *Policy guidance on AI for children*

Board or Ministry Policy Alignment:

The impact of Artificial Intelligence intersects with the following:
- Policy 14 – Student Assessment, Evaluation and Reporting in Peel Elementary and Secondary Schools
- Policy 78 - Digital Citizenship Policy
- Information, Access, and Privacy Policy
- Student Code of Conduct
- School Code of Conduct

Resource/Financial Implications:

There are no direct financial implications to review or develop a policy regarding artificial intelligence and plagiarism.

Legal implications:

The absence of guidance regarding plagiarism and artificially-generated content has implications regarding copyright and intellectual property rights.

Risk Assessment:

Plagiarized content fails to demonstrate evidence of student learning and achievement. Failing to recognize the role of artificial intelligence on assessment and evaluation affects student learning and achievement and can lead to an inconsistent response to plagiarized content.

Community Impact:

AI within education has a direct impact on educators and their practices as well as students. Expanding the scope of plagiarism to include artificially generated content can inform instructional practices including assessment and evaluation and can uphold students' commitment to academic honesty and integrity.

Next Steps

Action Required:

- Review and revise the Digital Citizenship Policy (currently projected for the 2022- 2023 school year) and the Student Assessment, Evaluation and Reporting in Peel Elementary and Secondary Schools Policy (currently projected for the 2023 – 2024 school year);
- Continue to monitor the regulatory, technological and local environments on the implications of AI in education and on PDSB policies;
- Deepen understandings of artificial intelligence in education in areas including:
  - The ethics, equity and human rights implications of AI in education and ways in which these technologies can uphold the PDSB's commitment to equity, anti-oppression and human rights;
  - The impact on teacher practices including assessment;
  - The impact on student learning.

Success Measures:

PDSB policies and procedures that are reflective of and responsive to the ever-changing landscape of technology advancements within education.

References:

Bill C-27. An Act to enact the Consumer Privacy Protection Act, the Personal Information and Data Protection Tribunal Act and the Artificial Intelligence and Data Act and to make consequential and related amendments to other Acts. First Session, Forty-fourth Parliament. 2022. Retrieved from https://www.parl.ca/DocumentViewer/en/44-1/bill/C-27/first-reading

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Governance and Policy Committee Meeting, April 12, 2023

Identity-Based Data Collection Policy

Strategic Alignment:
Anti-Racism Act, 2017

Municipal Freedom of Information and Protection of Privacy Act (MFIPPA)

Ministry Directives 9, 14, 22, 26

Report Type:
For information

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Overview

Objective:
To provide a copy of the draft Identity-Based Data Collection Policy, attached as Appendix A, for information and feedback by the Governance and Policy Committee.

Highlights:

- The PDSB has drafted the Identity-Based Data Collection Policy which establishes guiding principles governing the collection of identity-based data.
- This Policy will inform the PDSB's work to advance equity, human rights and anti-racism across all learning and working environments.

Background:

The Peel District School Board (PDSB) is committed to creating learning and working environments that are grounded in the principles of equity, human rights, inclusion, anti-racism, and anti-oppression. The collection of identity-based data will support the PDSB in upholding these commitments.

The PDSB currently collects identity-based data pertaining to Indigenous identity, ethnicity, racial identity, gender identity, sexual orientation, religion, and disability. The collection of identity-based data is a valuable tool to:
- understand the community being served by the PDSB;
- identify gaps and barriers, including systemic racism and discrimination;
- implement action plans to address those barriers and gaps;
- assess programming, initiatives, and processes;
- address ongoing disproportionalities and inequities experienced by PDSB students, staff, and trustees; and
- provide accountability.

The purpose of the draft Identity-Based Data Collection policy is to:
- Permit the collection of PDSB student, staff (current and prospective), and trustee identity-based data through various intentional methods that are guided by the Anti-Racism Act and related legislation;
- Establish the guiding principles governing the collection of identity-based data; and
- Inform the ongoing monitoring of PDSB's initiatives and system changes and help inform practices, policies, and programs to advance equity and accountability at the PDSB.

This Policy applies to all circumstances when the PDSB collects and uses the identity-based data of students, staff, and trustees of the PDSB as well as applicants to positions within the PDSB.

Evidence

Findings/Key Considerations:
The draft Identity-Based Data Collection Policy was informed by an environmental scan of related policies across the public sector and builds upon the work conducted in support of the Anti-Racism Policy, the 2023 Student Census and the 2022 Workforce Census. The draft Policy was also informed by consultations held with the Peel community including families, staff, the Indigenous Education Circle and the unions/associations.

Virtual consultations in support of the draft Identity-Based Data Collection Policy
Virtual consultations were held with the Peel community to inform the initial drafting of the policy. During the consultation on March 8th, 2023, several noteworthy concerns were raised. Four questions were asked of community members in attendance. Across all four questions there were several themes that arose at several different points and across most groups. These themes were concerns that:
  i. identity-based data is collected with a clear purpose in mind;
  ii. there is transparency and accountability between the board and community about all aspects of data collection and use;
  iii. trust in the board is low and needs to be raised; and,
  iv. the collected data is stored securely, and handled and shared in a way that limits the possibility of the data being used to perpetuate harms or enact targeted discrimination.
Some respondents did express hope that the continued collection of identity-based data might be used to improve programming, staffing, resource allocation, and student experience more broadly.

Impact Analysis

Equity & Human Rights Review:
Identity-based data will help the board:
- better understand the diversity of students, staff, and trustees;
- identify barriers to their success, inclusion and well-being;
- establish effective programs and initiatives; and
- eliminate systemic barriers such as racism and discrimination.

Board or Ministry Policy Alignment:

The collection of identity-based data will support the ongoing implementation of the Ministry Directives including Directives 9, 14, 22 and 26.

It also supports the analysis and reporting of performance indicators tied to the Board Improvement and Equity Plan (BIEP) and corresponding School Improvement and Equity Plans (SIEP). Further, the collection of identity-based data will support the monitoring of PDSB programs, initiatives and practices tied to equity, inclusion, human rights, anti-racism and anti-oppression. It will facilitate disaggregated identity-based analyses to identify and address inequities in achievement, well-being and experiences for students and staff within the Peel District School Board.

Resource/Financial Implications:

The adoption of the Identity-Based Data Collection Policy does not directly incur any financial implications. The ongoing collection of identity-based data aligns with the current work of PDSB departments including but not limited to Legal and Governance Services, Workplace Equity, and Innovation and Research.

Legal implications:

The Policy reinforces the board's commitment, in alignment with the *Anti-Racism* Act, to identify and address systemic racism through all practices, policies, programs and initiatives. The Identity-Based Data Collection Policy will ensure that the PDSB remains compliant with the Ministry of Education expectation for all school boards to collect and report on identity-based data. The Policy also ensures that the collection, use, retention, disclosure and disposal of identity-based data throughout the board is in accordance with the PDSB's Information Access and Privacy Policy, the *Municipal Freedom of Information and Protection of Privacy Act* and the *Personal Health Information Protection Act*.

Risk Assessment:

The PDSB is committed to advancing equity and reducing disproportionalities in outcomes and experiences for students, staff (current and prospective) and trustees. Failure to collect and analyze identity-based data affects our ability to create learning and working environments that uphold our commitment to equity and human rights.

Community Impact:

The development of an Identity-Based Data Collection Policy will help the PDSB understand the diversity within the PDSB community and design practices, policies, programs, and initiatives that advance equity for PDSB stakeholders.

Next Steps

Action Required:

- Analyze data from the current consultations with staff, central and field superintendents, trustees, the Indigenous Education Circle, and the PDSB Community.
- Prepare a revised draft to be brought forward to the Governance and Policy Committee meeting in Spring 2023.

Appendices

Appendix A – Identity-Based Data Collection Policy

PEEL DISTRICT SCHOOL BOARD POLICY
Identity-Based Data Collection Policy (Draft)

POLICY ID: TBD
FUNCTIONAL CATEGORY: TBD
RESPONSIBILITY: General Counsel and Governance Officer, Legal and Governance Services
APPROVAL: Board of Trustees
APPROVAL DATE: TBD
EFFECTIVE DATE: TBD
PROJECTED REVIEW DATE: 2026 – 2027 school year
REVIEW SCHEDULE: 3 years

1. Preamble

The Peel District School Board (PDSB) is committed to creating learning and working environments that are grounded in the principles of equity, human rights, inclusion, anti-racism, and anti-oppression. The collection of identity-based data is a valuable tool to:

- understand the community being served by the PDSB;
- identify gaps and barriers, including systemic racism and discrimination;
- implement action plans to address those barriers and gaps;
- assess programming, initiatives, and processes;
- address ongoing disproportionalities and inequities experienced by PDSB students, staff, and trustees; and
- provide accountability.

Identity-based data will support the Peel District School Board (the "PDSB") to create inclusive and safe learning and working environments.

In March 2020, the Ministry of Education issued 27 Directives to the Board. The Directives followed a Review of the PDSB, which raised concerns of systemic discrimination, specifically anti-Black racism; human rights practices; and governance issues. Several of the Directives spoke directly to the need to collect and analyse identity-based data to track progress on eliminating disparities in student and staff

outcomes. Additionally, the *Anti-Racism Act, 2017* requires all school boards in Ontario to collect identity-based data by January 2023.

2. Purpose

The purpose of this policy is to:

- Permit the collection of PDSB student, staff (current and prospective), and trustee identity-based data through various intentional methods that are guided by the *Anti-Racism Act* and related legislation.
- Establish the guiding principles governing the collection of identity-based data.
- Inform the ongoing monitoring of PDSB's initiatives and system changes and help inform practices, policies, and programs to advance equity and accountability at the PDSB.

3. Application and Scope:

This Policy applies to all circumstances when the PDSB collects and uses the identity-based data of students, staff, and trustees of the PDSB as well as applicants to positions within the PDSB.

This Policy will, at all times, be interpreted in a manner consistent with Board policies, the *Education Act* and its regulations, relevant Ministry PPMs, the *Ontario Human Rights Code*, the *Municipal Freedom of Information and Protection of Privacy Act (MFIPPA)*, the *Anti-Racism Act*, 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.

This Policy will be operationalized through Procedures.

4. Definitions

4.1 **De-identify:** In relation to the information of an individual, means to remove any information that identifies the individual or for which it is reasonably foreseeable in the circumstances that it could be utilized, either alone or with other information, to identify the individual.

4.2 **Equity:** A condition or state of fair, inclusive, and respectful treatment of all people. Equity does not mean treating people the same without regard for individual differences.

4.3 **Equity gap:** Refers to the disparities in outcomes and opportunities across race, ethnicity, socioeconomic status, gender, physical or mental abilities, and other socio-demographic identities and intersectionalities. These gaps often signal that current practices and procedures are not effectively supporting all individuals.

4.4 **Express consent:** Express consent is permission or agreement for the collection, use and disclosure of personal information that is given specifically by the individual to whom the information relates, either orally, in writing, or by some other positive action.

4.5 **Identity-Based Data:** Socio-demographic information about a person including, but not limited to, their race, Indigenous identity, ethnicity, religion, sex, sexual orientation, abilities status and gender expression and gender identity.

4.6 **Intersectionality:** Intersectionality is the way in which people's lives are shaped by their multiple and overlapping identities and social locations, which, together, can produce a unique and distinct experience for that individual or group, for example, creating additional barriers, opportunities, and/or power imbalances.

4.7 **PDSB Board or Board:** The Peel District School Board, or the "PDSB".

5. Policy

Guiding Principles

5.1 The PDSB believes that collecting, analysing, and using identity-based data are critical to understanding the diversity of Peel's students, staff, and trustees, to identify the barriers and equity gaps experienced by students and staff, particularly those who identify as Indigenous, Black, racialized, gender diverse, transgender, having diverse abilities, 2SLGBTQIA+, and/or individuals from equity-deserving groups.

5.2   The PDSB is committed to using student, staff (current and prospective), and trustee identity-based data to eliminate systemic racism and discrimination, and to inform practices, policies, and programs to advance equity and accountability at the PDSB.

5.3   The PDSB recognizes that identity-based data collection is complex and personal. The PDSB recognizes that a person may self-identify in multiple, intersecting ways, that the denial of any one identity will strip that individual of their complete identity. The PDSB understands that one's self-identity may evolve and change over time.

5.4   Further, the PDSB recognizes that in collecting, analysing, reporting, and making decisions based on identity-based data, communities are not monolithic and that there is diversity of needs, identities, and experiences of individuals within a community group.

5.5   The Anti-Racism Data Standards (Standards) guide the PDSB in the identification and monitoring of systemic racism. The Standards set out the requirements for the collection, use, disclosure, de-identification, management, publication, and reporting of race-based data. The PDSB will create a Framework that is informed by the Standards. The collection, use, disclosure, and analysis of identity-based data will be in compliance with the Framework.

5.6   The PDSB recognizes that the historical collection and use of identity-based data has been harmful to diverse communities. The PDSB commits to the implementation of appropriate measures and safeguards so that decision-making tied to the collection and use of identity-based data does not exacerbate inequities, systemic racism, and discrimination within the PDSB nor result in the stigmatization or stereotyping of any communities.

Community Engagement

5.7   The PDSB acknowledges that it has to build trust with various communities. The PDSB is committed to meaningful engagement with the PDSB Community, particularly with individuals who identify as Indigenous, Black, racialized, gender

diverse, transgender, having diverse abilities, 2SLGBTQIA+, and/or individuals from equity-deserving groups. This engagement should understand their priorities, concerns, needs, experiences, and interests in the collection, management, use and analysis of identity-based data. Meaningful engagement with the PDSB community can inform the interpretation of results that reflect their lived experiences.

Collection Methods

5.8   The PDSB will engage in various intentional methods of identity-based data collection, for example, school registration, student census, job applications and staff census.

5.9   Procedures will outline how to collect the data in ways that are trauma informed, culturally appropriate and anti-oppressive and uphold an individual's human rights.

5.10   The PDSB directs that methods and processes for collecting identity-based data be accessible in accordance with the *Accessibility for Ontarians with Disabilities Act, 2005 (AODA)* and its regulations.

5.11   The PDSB directs that methods and processes for collecting identity-based data be in compliance with MFIPPA.

Voluntary

5.12   The disclosure of identity-based data is voluntary.

5.13   The PDSB directs that voluntary express consent must be sought and obtained whenever collecting identity-based data and that consent may be withdrawn at any time. Express consent must be knowledgeable and obtained after the individual has been directly provided with the Notice of Collection.

5.14   The PDSB directs that a procedure be in place to correct or update identity-based data collected upon request of the individual.

Notice

5.15   The PDSB directs that when identity-based data is collected, the individual will be told the purpose of which the data is being collected, including whether it will be combined with other information, including personal information.

5.16   The PDSB shall only use the data for its identified purpose.

5.17   The PDSB directs that when identity-based data is collected, the PDSB will tell the individual that no program, service, or benefit will be withheld from a student, parent, staff (current and prospective), or trustee who chooses not to provide the requested identity-based data.

5.18   The PDSB directs that when identity-based data is being collected, the PDSB will provide the contact information of an employee who can answer the individual's questions about the collection.

Privacy and Confidentiality

5.19   The PDSB directs that when identity-based data is being collected, the individual will be told if the identity-based data collected will remain anonymous or confidential and how it may be disclosed.

5.20   The Framework will provide the PDSB with clear accountability mechanisms and rules, with organizational roles and responsibilities, for all aspects of collection, management, use, disclosure, and de-identification of identity-based data (where applicable), and the public release and reporting of information.

5.21   The PDSB directs that only those individuals who need to access the identity-based data in their work-related duties shall access the data, and only as reasonably necessary to fulfil their work-related duties. The PDSB prohibits using or accessing the data for any other purpose.

Training and Support

5.22   The PDSB is committed to providing relevant and effective training and supporting resources to designated staff that collect or have any access to

identity-based data so that they clearly understand how to comply with this Policy and related legislation.

Retention

5.23   Identity-based data will be kept for only as long as reasonable and necessary for its intended purpose.

MFIPPA

5.24   The *Municipal Freedom of Information and Protection of Privacy Act (MFIPPA)* governs the disclosure, use, and retention of identity data.

5.25   Personal information is collected under the legal authority of the *Education Act*, RSO 1990, c. E-2, as amended, Bill 114, *Anti-Racism Act, 2017*, and in compliance with the *Municipal Freedom of Information and Protection of Privacy Act*, RSO 1990, c. M-56. Questions regarding this collection should be directed to the program head for which the identity-based information is being collected.

Analysis and Reporting

5.26   The PDSB will develop and implement a framework, grounded in anti-racism, anti-oppression, and human rights to analyse identity-based data that is collected.

5.27   The PDSB will develop mechanisms for reporting on analyses using identity-based data. This includes, but is not limited to, the production of the Annual Equity Accountability Report Card which reports on disproportionalities in student outcomes and experiences using identity-based data.

5.28   The PDSB directs that when reporting to the Board of Trustees or to the public, the PDSB will de-identify personal information and identity-based data will be analysed and reported at the group level.

6. Roles and Responsibilities

Director of Education

6.1   Allocate staff and resources to support the implementation of this Policy and related Procedures.

6.2   Provide system leadership to ensure the implementation of this Policy and related Procedures.

Director's Council

6.3   Approve Procedures related to this Policy.

General Counsel and Governance Officer

6.4   Responsible for the collection of identity-based data for Trustees.

6.5   Accountable for the implementation of the policy.

6.6   Responsible for approving housekeeping amendments to this Policy.

6.7   Responsible for the post-implementation review of this Policy.

6.8   Provide interpretation of this Policy and related Procedures.

6.9   Support understanding and implementation of this Policy and related Procedures.

6.10   Create the implementation strategy for this Policy.

6.11   Review this Policy for compliance with legislative requirements.

Policy Development and Review Committee

6.12   Ensure this Policy is drafted with a human rights, equity, diversity, identity-affirming, inclusive, accepting, anti-racist, anti-colonial and anti-oppression stance and aligns with the PDSB's vision, strategic goals, and priorities.

6.13   Provide feedback, advice and recommendations in the Policy development, the communication plan, and the community engagement plan.

Innovation and Research

6.14   Responsible for the system collection of census data which includes identity-based data on a regular basis.

6.15   Responsible for protecting the identity-based data collected as per MFIPPA guidelines.

6.16   Responsible for producing the annual Equity Accountability Report Card utilizing the identity-based data collected with an anti-racist and anti-oppression framework.

Human Resources, Partnerships and Equity

6.17   Responsible for the system collection of identity-based data for staff and prospective staff on a regular basis.

6.18   Responsible for protecting the identity-based data collected as per MFIPPA guidelines.

6.19   Responsible for ensuring staff identity-based data is used to inform practices, policies, and programs to advance equity and accountability within Human Resources.

Parents, Students, Staff, Trustees

6.20   Support the collection of identity-based data.

6.21   Adhere to this Policy.

6.22   Communicate Policy concerns with the Governance Officer.

7. Appendices

7.1   Appendix A – Understanding the Data Standards for the Identification and Monitoring of Systemic Racism (*to be developed)*

8. Reference Documents

Policy 81: Voluntary, Confidential Self-Identification Policy for Indigenous Students

Information, Access and Privacy Policy

Legislation

Anti-Racism Act, 2017, 2017, S.O. 2017, c. 15 and the *Data Standards for the Identification and Monitoring of Systemic Racism* made under s. 6(1) of this Act

O. Reg 267/18

Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c. M.56

Accessibility for Ontarians with Disabilities Act, 2005, S.O. 2005, CHAPTER 11

9. Revision History

Review Date	Approval Date	Description

Governance and Policy Committee Meeting, April 12, 2023

Policy Management Program Update

Strategic Alignment:
Ministry Directive 5

Report Type:
Update

Prepared by:	LaShawn Murray, Policy Analyst
	Kathryn Lockyer, General Counsel and Governance Officer
Submitted by:	Rashmi Swarup, Director of Education

Overview

Update:
To provide an update on the progress of the Peel District School Board (PDSB) Policy Management Program.

Highlights:

- As a component of the Policy Management Program and to operationalize the Policy Development and Review Framework, Director's Council has approved the following procedures:
  - Policy and Procedure Management Procedure
  - Policy Development and Review Procedure
  - Procedure Development and Review Procedure
- The internal and external PDSB website pages for Policies and Operating Procedures are currently being redesigned to support the rollout of the Policy Management Program.

Background:

At the June Governance and Policy Committee meeting, the Legal and Governance Services Department provided an update on the development of the PDSB's Policy Management Program. The Policy Management Program is currently under development and seeks to:
- Develop and implement a framework for a systematic approach to the development, review, approval, and repeal of policies;
- Establish naming and numbering conventions for all policies and procedures that reflect their purpose and function;
- Identify and address gaps in both policies and procedures; and
- Ensure that all procedures are updated and ladder up to a parent policy.

In the fall 2022, the Board approved the Policy Development and Review Framework. This framework is a foundational element of the Policy Management Program and sets out a transparent and consistent approach to developing, reviewing, amending, approving, and repealing PDSB policies.

The framework ensures that all board policies:
- Are compliant with relevant legislation and align with the PDSB's vision, goals, and priorities;
- Are accessible with respect to language and availability;
- Are developed and reviewed within a human rights, equity, diversity, inclusion, anti-colonial, anti-racist, and anti-oppression stance;
- Include community engagement where applicable; and
- Are reviewed on a predetermined review schedule.

This report provides an update on the development and implementation of the Policy Management Program.

Evidence

Findings/Key Considerations:
In April 2023, Director's Council approved the following three procedures to operationalize the Policy Development and Review Framework and the Policy Management Program.

1. **Policy and Procedure Management Procedure (attached as Appendix I)**
This procedure outlines the new identification system (naming and numbering conventions) and formatting requirements for all policies, procedures, and related forms. Historically, PDSB policies have been developed on an ad hoc basis and were numbered on a consecutive basis without an identified connection to the purpose of the policy. Additionally, procedures have not consistently laddered up to a policy and were numbered with a connection to the organizational department at the time but not necessarily to the procedure's function. With changes to department names through reorganizations over the years, the procedure names and identification are not necessarily reflective of their purpose or function.

This new procedure assigns all policies, and subsequently their procedures and forms to a specified functional category. Accordingly, policies will receive an identification number that relates to their functional category and approval date. Procedures and forms will receive an identification that indicates a clear connection to their parent policy. These conventions were informed by an environmental scan across other school boards. This procedure further specifies that policies and procedures will be named in a clear and concise manner whereby the title of the policy or procedure accurately reflects the subject matter and that within these documents, they will refer to position titles and departments and not specific individuals.

To ensure effective access and retrieval of these documents, we have been working with both communications and LTSS to redesign the Policies and OPs page on both the external website and the intranet. The rollout of the new identification system will occur once the new website pages are functional. The policy and procedure templates are currently in use.

2. **Policy Development and Review Procedure (attached as Appendix II) and**
3. **Procedure Development and Review Procedure (attached as Appendix III)**
The Policy Development and Review Procedure outlines the stages of the process from the identification of a policy need to Trustee approval, communications, and implementation. Similarly, the Procedure development and review procedure outlines the stages of the process from the identification of the need for a procedure, to Director's Council approval, communications, and implementation.

These procedures:
- Describe the process for notifying Director's Council and Legal and Governance.
- Direct the formation of a Committee led by the responsible office.
- Reinforce the need for consultations, community engagement where applicable and an environmental scan.
- Build in accountability through including a workplan, a sign off process during the review stage and the direction to have an implementation and communications plan for each policy or procedure.

To support each responsible office, the procedures include:

- A workplan that aligns with each stage of the policy or procedure development process and enforces the documentation of all steps including the committee composition, the critical path, the consultation workplan, any evidence gathered through research and consultations, and department sign off.
- The sign off sheet in which applicable department leads attest to their review of the draft policy/procedure and the accuracy of information and content related to their respective area of expertise.
- A Consultation Plan Template where the committee specifies the stakeholder groups being consulted, the methods of engagement, proposed questions or discussions areas and timelines as well as documents any additional information including links to PowerPoints or other resources.

The workplan and associated documents, once completed, will be retained by Legal and Governance, and the responsible office.

Impact Analysis

Equity & Human Rights Review:

These procedures set out a consistent and transparent approach to policy and procedure development and review that upholds the PDSB's commitment to equity, diversity, inclusion, human rights, anti-colonialism, anti-racism, anti-oppression, and accessibility. These procedures also reinforce the PDSB's commitment to engage the PDSB community, where applicable, in the development and review of policies and procedures.

Board or Ministry Policy Alignment:

These procedures support the expectations of:
- Ministry Directive 5
- Policy Development and Review Framework

Resource/Financial Implications:

There are no direct financial implications tied to the implementation of these procedures. The rollout of the Policy Management Program is a collaborative project between Legal and Governance Services alongside LTSS and Public Engagement and Communications.

Legal implications:

The consistency and transparency afforded by the Policy Development and Review Framework and these procedures will help to ensure legislative compliance.

Risk Assessment:

Continuing the current ad hoc and inconsistent policy and procedure development and review processes can increase the risk of noncompliance by policy stakeholders and impacts accountability.

Community Impact:

The implementation of the Policy Management Program will ensure all community members are able to effectively access PDSB policies and procedures. These procedures also reinforce the PDSB's commitment to community engagement.

Next Steps

Action Required:

- Finalize the redesign of the Policies and Procedures website pages
- Reclassify all policies, procedures and related forms based on the new numbering conventions

Communications:
- Communicate the procedures to all responsible offices
- Design communication materials to update the PDSB community on the new naming conventions

Success Measures:

All policies and procedures will adhere to the guidelines as specified by these procedures.

References:

Governance and Policy Committee Report – Policy Management Program (June 15, 2022)

Governance and Policy Committee Report – Policy Development and Review Framework (September 14, 2022)

Appendices

Appendix I – Policy and Procedure Management Procedure

Appendix II – Policy Development and Review Procedure

Appendix III – Procedure Development and Review Procedure

PEEL DISTRICT SCHOOL BOARD PROCEDURE
Policy and Procedure Management

PROCEDURE ID: Enter Text

PARENT POLICY: Policy Development and Review Framework

RESPONSIBILITY: Legal and Governance Services

APPROVAL: Director's Council

APPROVAL DATE: April 4, 2023

EFFECTIVE DATE: TBD

PROJECTED REVIEW DATE: Click or tap here to enter text.

REVIEW SCHEDULE: Click or tap here to enter text.

1. Purpose

To define the policy and procedure identification system and formatting requirements as part of the Policy Management Program.

2. Application and Scope:

This procedure applies to all policies and procedures developed and maintained by the Peel District School Board.

3. Definitions

3.1 **Policy:** The written statements that create the framework that governs the administration and operation of the PDSB. A Policy is a high-level statement, principle or rule of what is to be achieved. Policies are subject to a formal review and approval process.

3.2 **Procedure:** The written statement that explains the details of how Policies are to be implemented. A Procedure provides the steps, instructions, or methods on how to implement a policy. Procedures are the responsibility of directors and staff, not trustees. Every Procedure is attached to a Policy.

4. Procedure

Policy, Procedure, and Form Management

4.1   All policies, procedures and forms must have a unique identifier.

4.2   All policies, procedures and forms are to be maintained in the following
       categories:

Functional Category	Alpha Code	Classification Number
Governance	GOV	100
Anti-Racism and Equity	ARE	200
Human Rights Office	HRO	300
Legal	LEG	400
Health and Safety	HAS	500
Operations	OPS	600
Facilities, Planning and the Environment	FPE	700
Finance	FIN	800
Human Resources	HRS	900
Communications and Community Engagement	COM	1000
Indigenous Education	INE	1100
Student Achievement and Well-Being	SAW	1200
Special Education	SPE	1300

4.3   Policies, procedures, and forms will be accessible in the public domain, on the
       PDSB website, except for reasons of security or to protect the PDSB's legal
       interests.

4.4   The Policy Analyst will assign an identification to each policy, procedure and form
       once approved.

4.5   Identifiers for policies and procedures are not to be re-issued once repealed.

Policy Identification

4.6   Policy ID will be composed of three parts:

   a)   Part 1: Alpha code composed of three digits representing the functional category

   b)   Part 2: classification number representing each functional category.

   c)   Part 3: Assigned policy number (e.g., 1, 2, 3)

4.7   Policies are to be numbered in chronological order based on the approval date of the policy, from oldest to most recent.

Procedure Identification

4.8   Procedures are to be attached to a parent Policy.

4.9   Procedure ID will consist of two parts:

   a)   Part 1: policy ID of the parent policy

   b)   Part 2: Assigned procedure letter (e.g., A, B, C)

Form Identification

4.10   Forms are to be attached to a parent procedure. In the event where the same form is referenced across multiple procedures, the form will be assigned in alpha order.

4.11   Form ID will consist of two parts:

   a)   Part 1: Procedure ID of the parent procedure

   b)   Part 2: Assigned form number, preceded by the letter "F" (e.g., F001, F002, F003, etc.)

4.12   Part 1 and 2 of the form ID will be separated by a hyphen (e.g., GOV100A-F001)

Naming Conventions

4.13   Policies and procedures will be named in a clear and concise manner whereby the title of the policy or procedure accurately reflects the subject matter.

4.14   Policies and procedures will refer to position titles and departments and not specific individuals.

Format and Style

4.15   Policies and procedures will be presented using the Policy Template or Procedure Template respectively.

4.16   Policies and procedures will be written in plain language to ensure accessibility.

4.17   Policies and procedures will be written using gender neutral language.

4.18   Hyperlinks are not to be used within a policy or procedure. Rather, references can be listed.

4.19   Abbreviations and acronyms will be defined within a policy or procedure.

4.20   Definitions will be consistent across policies and procedures.

5. Roles and Responsibilities

General Counsel and Governance Officer

5.1   Ensure all policies, procedures and forms comply with the requirements of this procedure.

5.2   Oversee the development, implementation, and review of the PDSB policy management program.

Policy Analyst

5.3   Assign an identification to each policy, procedure and form once approved.

5.4   After approval of a policy or procedure, add the approval date, and complete any other required information as per the policy or procedure template.

5.5   Ensure policies, procedures and forms are up-to-date and maintained on the
        PDSB websites.

5.6   Administer and maintain the PDSB policy management program.

6. Appendices

6.1   Appendix A – Policy Template

6.2   Appendix B – Procedure Template

7. Reference Documents

Policy Development and Review Framework

Report Writing Tips

8. Revision History

Review Date	Approval Date	Description

PEEL DISTRICT SCHOOL BOARD POLICY
[Policy Title]

POLICY ID: Enter Text

FUNCTIONAL CATEGORY: Enter Text

RESPONSIBILITY: The role responsible for the policy

APPROVAL: Board of Trustees

APPROVAL DATE: Click for date

EFFECTIVE DATE: Click for date

PROJECTED REVIEW DATE: Click or tap here to enter text.

REVIEW SCHEDULE: Click or tap here to enter text.

1. Purpose

Describe the policy's objective(s).

2. Application and Scope:

Describe to who or what the policy applies.

3. Definitions

3.1   Provide definitions for key concepts and terms within the policy. Definitions ought to be consistent in all PDSB policies. This list should be in alphabetical order.

4. Policy

4.1   Explain the values and principles which underlie and govern the policy. If more than one paragraph is required, the numbering convention will be:

Sample

4.2   Begin Text Here (First sub-section)

    a)   Begin Text Here (Second sub-section)

        (i)   Begin Text Here (Third sub-section)

4.3   Begin Text Here

5. Roles and Responsibilities

Appendix A – Policy Template

5.1 Identify the roles and responsibilities of PDSB Community as related to the procedure.

6. Appendices

6.1 Specify any appendices related to the policy by alphabetic code and name.

Sample

6.2 Appendix A – Title of Appendix A

7. Reference Documents

List any associated policies, procedures, guidelines, legislation, or documents on which the policy is based or by which it is to be implemented.

8. Revision History

Review Date	Approval Date	Description

PEEL DISTRICT SCHOOL BOARD PROCEDURE
[Procedure Title]

PROCEDURE ID: Enter Text

PARENT POLICY: Enter Text

RESPONSIBILITY: The role responsible for the Procedure

APPROVAL: Director's Council

APPROVAL DATE: Click for date

EFFECTIVE DATE: Click for date

PROJECTED REVIEW DATE: Click or tap here to enter text.

REVIEW SCHEDULE: Click or tap here to enter text.

1. Purpose

Describe the procedure's objective(s).

2. Application and Scope:

Describe to who or what the procedure applies.

3. Definitions

3.1 Provide definitions for key concepts and terms within the procedure. Definitions ought to be consistent in all PDSB policies and procedures. This list should be in alphabetical order.

4. Procedure

4.1 Explain the values and principles which underlie and govern the procedure. If more than one paragraph is required, the numbering convention will be:

Sample

4.2 Begin Text Here (First sub-section)

    a) Begin Text Here (Second sub-section)

        (i) Begin Text Here (Third sub-section)

4.3 Begin Text Here

5. Roles and Responsibilities

5.1　Identify the roles and responsibilities of PDSB Community as related to the procedure.

6. Appendices

6.1　Specify any appendices related to the procedure by alphabetic code and name.

Sample

6.2　Appendix A – Title of Appendix A

7. Reference Documents

List any associated policies, procedures, guidelines, legislation or documents on which the procedure is based or by which it is to be implemented.

8. Revision History

Review Date	Approval Date	Description

PEEL DISTRICT SCHOOL BOARD PROCEDURE
Policy Development and Review Procedure

PROCEDURE ID: TBD

PARENT POLICY: Policy Development and Review Framework

RESPONSIBILITY: Legal and Governance Services

APPROVAL: Director's Council

APPROVAL DATE: April 4, 2023

EFFECTIVE DATE: April 4, 2023

PROJECTED REVIEW DATE: 2027-2028 school year

REVIEW SCHEDULE: 5 years

1. Purpose

A process map for the development or review of policies.

2. Application and Scope:

These procedures apply to the development and review of Peel District School Board (PDSB) policies.

3. Definitions

3.1 **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.

3.2 **Policy Development and Review Committee:** Ad hoc committee of internal stakeholders composed of a diverse group of system leaders who are familiar with the policy being reviewed or the need for a policy to be developed. External stakeholders may be included for a specific purpose.

3.3 **Responsible Office:** The office designated as responsible and accountable for a policy. The Responsible Office is responsible for ensuring the Policy Development and Review Framework and related procedures are followed during

a policy development or review. The Responsible Office is at the level of Director, Associate Director, Superintendent, Controller, Executive Lead or Manager.

4. Procedure

The below stages are not necessarily linear. For example, the community engagement, research, and revisions may repeat and loop back several times before a policy is approved.

Stage 1: Identify the Need

4.1 Policy development and reviews can occur for many reasons, including:

    a) Periodic Review.

    b) Policy gaps identified through:

        (i) Legislative changes.

        (i) Ministry directive.

        (ii) Resolution from the Board of Trustees

        (iii) Staff proposal based on program identified need.

        (iv) Data or research has indicated a need for policy review.

        (v) Human rights complaints or resolutions.

        (vi) Evidence of systemic barriers or bias

        (vii) PDSB community input which may have been identified through a notice to the Legal and Governance Services Department or a delegation to the Board.

Stage 2: Assessment and Prioritization

4.2 **Policy Development:** The Responsible Office will coordinate with the Legal and Governance Services department on the development of a policy proposal. This proposal will specify:

    a) Background on the issue

b) An analysis that demonstrates that the recommendation is a sound response to the issue

c) Staff recommendation to Director's Council for the development of a policy.

4.3 The policy proposal will be presented to Director's Council through the Responsible Office. The recommendation is approved, amended or rejected by Director's Council.

4.4 **Policy Review:** The Legal and Governance Services Department will notify the Responsible Office of the policy to be reviewed in accordance with the Policy Review Schedule. In collaboration with the Legal and Governance Services Department, the Responsible Office will prepare a For Information memo to notify the Director's Office of the policy being reviewed.

4.5 **Ministry Mandated Policy:** For cases where the development or review of a policy is legislated by government, this information should be forwarded to Legal and Governance Services for determination of a Responsible Office. A For Information memo will be prepared by the Responsible Office in collaboration with the Legal and Governance Services Department. A proposal is not necessary for Ministry Mandated policies unless the proposed scope and purpose of the policy significantly exceeds the parameters set out by the government body. In the instances where consultation is required but there is insufficient time for a full consultation given government deadlines, an Interim Policy will be developed with consultation occurring later.

4.6 The Director of Education will notify the Board of Trustees about all policies under development or review.

Stage 3: Develop a Plan

4.7 The Responsible Office will strike a Policy Development and Review Committee (Committee) specifically for the policy under development or review. The Committee will be an internal group of key stakeholders and include those who are familiar with the policy being reviewed, those who will be most impacted by

the policy, and subject matter experts. The Committee may include external stakeholders for a specific purpose. The Committee will be chaired by a staff person in the Responsible Office. At least one staff member of the Legal and Governance Services Department should be a member of the Committee. The number of Committee members is flexible, taking into consideration the number of key stakeholders and ensuring the Committee remains functional. At a minimum, there should be three members on the committee.

4.8   The Committee will discuss the framework of the policy, the goals of the policy, identify gaps in the existing policy, identify issues in the existing policy and provide initial and ongoing feedback for drafting. This will include a determination of revisions/amendment or a full replacement of the existing policy.

4.9   The Committee will develop a plan using the Policy Development and Review Work Plan (Appendix A) with phases and timelines that will include research, drafting, communication, community engagement, review, revision, approval, and implementation.

4.10   The Committee will review PDSB's Community Engagement Framework and consider the most appropriate level of community engagement, as applicable, at all stages in the development and review of the policy.

4.11   The Committee will identify any related procedures to be reviewed and the Responsible Office will adhere to the Procedure Development and Review Procedure.

Stage 4: Research

4.12   **Organizational Expertise:** The Responsible Office will guide research on issues related to best practices and legislative requirements related to the policy being developed and reviewed. The Responsible Office will also conduct an environmental scan of best practices for similar policies across jurisdictions.

Stage 5: Draft

4.13   **Input from affected stakeholders**: Affected stakeholders can provide relevant feedback on the issues and concerns the policy is meant to address. Actively

engaging with members of the PDSB community, as applicable, will support making informed decisions on the policy's content. This engagement should be ongoing and occur before and after a draft is created. For example, before drafting:

a) Consider what questions could be put to the PDSB community to support the drafting.

b) Consider what are the concerns or issues that the community has that could be addressed in the policy being developed or reviewed.

4.14 Engagement with members of the PDSB community must follow the principles within any available PDSB Community Engagement Framework policy or procedure. The Associate Director of School Improvement & Equity, Curriculum & Instruction, Student & Community Engagement or their designate will act as a resource.

4.15 All policies are to be drafted using the Policy Template. All policies are to be drafted using plain language to ensure accessibility.

4.16 All policies are to be drafted with a human rights, equity, diversity, inclusion, anti-colonial, anti-racist, and an anti-oppression framework.

4.17 After drafting, the Committee will review the draft policy to provide feedback and guidance. The Responsible Office should actively engage with the Committee members to reach consensus, even if there are differing views.

Stage 6: Internal Review and Sign-Offs

4.18 Once the Committee has achieved consensus or there has been a decision to proceed without consensus, the draft policy will be reviewed by PDSB departments as identified in the Policy Development and Review Work Plan. In addition, the following department will be required to sign-off on the proposed draft policy:

a) Legal and Governance Services to assess risk and ensure compliance with all Ministry directives and legislative requirements.

4.19   The Associate Directors and any of their designates, and the Executive Lead Human Rights will act as a resource to the Responsible Office, and if requested, will review any draft policy and provide feedback.

4.20   The Responsible Office will review and consider the feedback collected and revise the draft policy as required.

4.21   Once each office has reviewed the policy they must sign-off (Appendix B - PDSB's Policy Review and Sign-off Sheet) on the policy before it is presented to Director's Council for their review.

Stage 7: Director's Council Review

4.22   The draft policy will be presented to Director's Council for review and feedback before proceeding with any consultations, if applicable. In preparation for Director's Council, the Committee will prepare a Board Report on the policy indicating the revisions/amendments or new provisions. Further, the report should indicate if the existing policy, as applicable, will be repealed or if the draft policy is an amendment to the existing policy. The Committee will also prepare a consultation plan (using the Consultation Plan template – Appendix C) and append the draft policy.

Stage 8: Consultations

4.23   Where applicable, the Committee will engage in consultations on the draft policy. Consultations must follow the principles and procedures in any applicable PDSB Community Engagement Framework Policy. External consultations must engage stakeholders who are affected by the proposed draft policy. The Responsible Office will ensure that there is an opportunity for the Board of Trustees, and the Board of Trustees' Governance and Policy Committee to provide input and policy direction into the development or review of the policy.

4.24   A variety of consultation methods will be applied in the external consultations.

4.25   The Associate Director of School Improvement & Equity, Curriculum & Instruction, Student & Community Engagement or their designate along with the

Executive Lead of Public Engagement and Communications or their designate will assist the Responsible Office on facilitating consultations.

Stage 9: Revise and Edit

4.26   The Responsible Office will review the feedback collected by the Committee, during consultations and the internal reviews and revise the draft policy and procedures (where applicable) as required.

4.27   PDSB's commitment to community engagement must be demonstrated through revisions in the draft policy to reflect what was shared by the community, to the extent possible.

Stage 10: Final Internals Review and Sign-Offs

4.28   The revised draft policy will be reviewed by the Legal and Governance Services Department.

4.29   Following legal review, the Responsible Office will present the revised draft for feedback and approval from Director's Council. Director's Council will review the policy and may make suggestions or recommendations for revision. The policy may come back to the Director's Council as many times as needed.

Stage 11: Approval

4.30   Once the Director's Council has approved the policy, the Responsible Office will present the policy to the Board of Trustees at the Governance and Policy Committee who will review the policy and may make suggestions or recommendations for revision. The policy may come back to the Board of Trustees Governance and Policy Committee as many times as needed.

4.31   Once the Board of Trustees Governance and Policy Committee approves the draft policy, the Director of Education will bring the draft policy forward to the Board of Trustees for resolution.

Stage 12: Communications

4.32   Once approved by resolution of the Board of Trustees, the policy will be forwarded to the Policy Analyst for publication on the PDSB websites. The Policy

Analyst will add the approval date and any other required information as per the Policy Template. The Responsible Office will also notify the system.

4.33   The Responsible Office will prepare a Community Engagement Report for the Board of Trustees, as required under the Community Engagement Framework, when presenting a new or revised policy. That Community Engagement Report will be publicly available.

Stage 13: Implementation

4.34   The Responsible Office will prepare an implementation plan in consultation with the Committee and Director's Council.

4.35   The Responsible Office will ensure that substantive changes to Board policy are reflected in all appropriate department documents (e.g., operational procedures).

Stage 14: Maintenance and Review

4.36   The Responsible Office will monitor the implementation of the Policy.

4.37   The Responsible Office will conduct an implementation review within 18 months.

5. Roles and Responsibilities

5.1   Responsible Office

    a) Ensure that the policy review and development meet the requirements of this procedure.

    b) Ensure the content of policies and procedures are relevant to the purpose of the policy.

    c) Interpret policies and procedures.

    d) Review policies regularly to determine whether any gaps exist.

    e) Propose new policies, substantive amendments to existing policies or the repeal of policies to the PDSB Trustees following the Procedure to develop, review, amend, approve and repeal PDSB policies.

f) Propose housekeeping amendments to existing policies to the Governance Officer.

g) Create implementation strategy for new policies.

h) Conduct post-implementation review of approved policies.

6. Appendices

Appendix A – Policy Development and Review Workplan

Appendix B – PDSB's Policy Review and Sign Off Sheet

Appendix C – Consultation Plan Template

7. Reference Documents

Policy Development and Review Framework

8. Revision History

Review Date	Approval Date	Description

PEEL DISTRICT SCHOOL BOARD

Policy Development and Review Workplan

All policies will be developed in accordance with the Policy Development and Review Procedure, the Policy Development and Review Framework and the expectations set out in the Anti-Racism Policy, the Human Rights Policy and the Equity and Inclusive Education Policy.

Policy Management
Proposed Policy Title:
Responsibility:
Projected Governance and Policy Committee Meeting:

Stage 1: Identify the Need
☐ Policy Development
☐ Policy Review
☐ Ministry Mandated Policy

Stage 2: Assessment and Prioritization

Rationale for Policy: [brief summary]
Link to Policy Proposal:

The policy proposal was authorized by Director's Council on [provide date].

Stage 3: Develop a Plan
Policy Development and Review Committee Composition

Name	Position	Department	
*		Responsible Office	
		Legal and Governance Services	

*Chair of the Committee

Critical Path

Stage	Task	Responsibility	Deadline	Notes

Stage 4: Research
Evidence:

Sources of Information:

Findings from the environmental scan:

Stage 5: Draft
The draft policy aligns with the Policy Development and Review Framework Policy Template:
☐ Yes
☐ No

An environmental scan has been conducted and is included in this workplan.
☐ Yes
☐ No

Stage 6: Internal Reviews and Sign Offs
The draft Policy will include input from the following PDSB departments affected by the Policy:
-
-
-
-

In addition, the following department is required to sign off on the proposed draft policy:
Legal and Governance Services.

Stage 7: Director's Council Review

The draft Policy will be submitted to Director's Council on:

Are external consultations applicable to this Policy?
☐ Yes
☐ No

Stage 8: Consultations
Link to Consultation Work Plan:

The following methods will be applied in the external consultations (select all that apply):
☐ Invitation for written feedback
☐ Public meeting
☐ Facilitated focus group
☐ Expert panel discussion
☐ Survey
☐ Posting on the PDSB website
☐ Other: [provide details]

Stage 9: Revise and Edit

Link to consultation report:

Stage 10: Final Internal Review and Sign-Offs
The revised draft has been reviewed by the following affected PDSB departments:
Link to Policy Review Sign Off Sheet:

Legal and Governance Services completed the review of the draft policy on [provide date].

Stage 11: Approval
Director's Council has approved the final draft policy on [provide date].

The final draft Policy will be presented to Governance and Policy Committee on the following date: [provide date]

Stage 12: Communications
Following Board approval, the new Policy will be communicated through
- Posting of new Policy on PDSB websites through the Policy Analyst
- Sharing with staff and stakeholders via appropriate mechanisms
- Communication to staff through Managers/Supervisors and school administrators through respective superintendents, as applicable
- Other:

Stage 13: Implementation
Link to Implementation Plan:

PEEL DISTRICT SCHOOL BOARD
POLICY REVIEW SIGN OFF SHEET

Policy Title:

Responsible Office:

Policy Type: ☐New   ☐Revised

Reviewed By:

Position/Department	Name	Signature	Date
[Lead – Responsible Office]			
[Legal and Governance Services]			
[Head(s) of Departments directly impacted by the Policy]			

Signatories confirm the following:

- The review of the draft policy
- The accuracy of information and content related to their respective area of expertise

PEEL DISTRICT SCHOOL BOARD

Policy Development and Review: Consultation Workplan

All policies will be developed in accordance with the Policy Development and Review Procedure, the Policy Development and Review Framework and the expectations set out in the Anti-Racism Policy, the Human Rights Policy and the Equity and Inclusive Education Policy.

Stakeholder Group(s)	Method(s) of Engagement	Timelines	Proposed Questions or Discussion Areas	Notes	Links to any resources or documents

PEEL DISTRICT SCHOOL BOARD PROCEDURE
Procedure Development and Review Procedure

PROCEDURE ID: TBD

PARENT POLICY: Policy Development and Review Framework

RESPONSIBILITY: Legal and Governance Services

APPROVAL: Director's Council

APPROVAL DATE: April 4, 2023

EFFECTIVE DATE: April 4, 2023

PROJECTED REVIEW DATE: 2027-2028 school year

REVIEW SCHEDULE: 5 years

1. Purpose

A process map for the development or review of procedures.

2. Application and Scope:

These procedures apply to the development and review of Peel District School Board (PDSB) procedures.

3. Definitions

3.1   **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.

3.2   **Procedure Development and Review Committee:** Ad hoc committee of internal stakeholders composed of a diverse group of system leaders who are familiar with the procedure being reviewed or the need for a procedure to be developed. External stakeholders may be included for a specific purpose.

3.3   **Responsible Office:** The office designated as responsible and accountable for a policy. The Responsible Office is responsible for ensuring the Policy Development and Review Framework and related procedures are followed during a policy development or review. The Responsible Office is at the level of Director, Associate Director, Superintendent, Controller, Executive Lead or Manager.

4. Procedure

4.1   The below stages are not necessarily linear. For example, the community engagement, research, and revisions may repeat and loop back several times before a procedure is approved.

Stage 1: Identify the Need

4.2   Procedure development and review can occur for many reasons, including:

a)   Periodic Review of a procedure

b)   Periodic review or development of a policy

c)   Procedure gaps identified through:

(i)   Legislative changes.

(ii) Ministry directive.

(iii) Resolution from the Board of Trustees

(iv) Staff proposal based on program identified need.

(v)   Data or research has indicated a need for procedure review.

(vi) Human rights complaints or resolutions.

(vii) Evidence of systemic barriers or bias

(viii) PDSB community input which may have been identified through a notice to the Legal and Governance Services Department or a delegation to the Board.

Stage 2: Assessment and Prioritization

4.3 **Policy Development:** The Responsible Office will coordinate with the Legal and Governance Services department on the development of a For Information memo. This memo will specify:

a) Rationale for the procedure

b) How the procedure links to its parent policy. All procedures must ladder up to a parent policy.

4.4 The For Information memo will be shared with the appropriate Executive Lead, Associate Director, General Counsel, Controller or Chief Information Officer.

4.5 **Policy Review:** The Legal and Governance Services Department will notify the Responsible Office of the procedure to be reviewed in accordance with the Policy Review Schedule. In collaboration with the Legal and Governance Services Department, the Responsible Office will prepare a For Information memo to notify the appropriate Executive Lead, Associate Director, General Counsel, Controller or Chief Information Officer.

4.6 **Ministry Mandated Procedure:** For cases where the development or review of a procedure is legislated by government, this information should be forwarded to Legal and Governance Services for determination of a Responsible Office. A For Information memo will be prepared by the Responsible Office in collaboration with the Legal and Governance Services Department. In the instances where consultation is required but there is insufficient time for a full consultation given government deadlines, an Interim procedure will be developed with consultation occurring later.

Stage 3: Develop a Plan

4.7 The Responsible Office will strike a Procedure Development and Review Committee (Committee) for the procedure under development or review. This Committee could be the same Committee if the parent policy is under development or review. The Committee will be an internal group of key stakeholders and include those who are familiar with the procedure being reviewed, those who will be most impacted by the procedure, and subject matter

experts. The Committee may include external stakeholders for a specific purpose. The Committee will be chaired by a staff person in the Responsible Office. At least one staff member of the Legal and Governance Services Department should be a member of the Committee. The number of Committee members is flexible, taking into consideration the number of key stakeholders and ensuring the Committee remains functional. At a minimum, there should be three members on the committee.

4.8   The Committee will discuss the framework of the procedure, the goals of the procedure, identify gaps in the existing procedure, identify issues in the existing procedure, and provide initial and ongoing feedback for drafting. This will include a determination of revisions/amendment or a full replacement of the existing policy.

4.9   The Committee will develop a plan using the Procedure Development and Review Work Plan (Appendix A) with phases and timelines that will include research, drafting, communication, community engagement, review, revision, approval, and implementation.

4.10   The Committee will review PDSB's Community Engagement Framework and consider the most appropriate level of community engagement, as applicable, at all stages in the development and review of the procedure.

Stage 4: Research

4.11   **Organizational Expertise:** The Responsible Office will guide research on issues related to best practices and legislative requirements related to the procedure being developed and reviewed. The Responsible Office will also conduct an environmental scan of best practices for similar procedures across jurisdictions.

Stage 5: Draft

4.12   **Input from affected stakeholders**: Affected stakeholders can provide relevant feedback on the issues and concerns the procedures is meant to address. Actively engaging with members of the PDSB community, as applicable, will support making informed decisions on the procedure's content. This engagement

may be ongoing and occur before and after a draft is created. For example, before drafting:

a) Consider what questions could be put to the PDSB community to support the drafting.

b) Consider what are the concerns or issues that the community has that could be addressed in the procedure being developed or reviewed.

4.13 Engagement with members of the PDSB community must follow the principles within any available PDSB Community Engagement Framework policy or procedure. The Associate Director of School Improvement & Equity, Curriculum & Instruction, Student & Community Engagement or their designate will act as a resource. The Committee will use the Procedure Development and Review Consultation Plan (Appendix B) to support with engagement.

4.14 All procedures are to be drafted using the Procedure Template. All procedures are to be drafted using plain language to ensure accessibility.

4.15 All procedures are to be drafted with a human rights, equity, diversity, inclusion, anti-colonial, anti-racist, and an anti-oppression framework.

4.16 After drafting, the Committee will review the draft procedure to provide feedback and guidance. The Responsible Office should actively engage with the Committee members to reach consensus, even if there are differing views.

Stage 6: Internal Review and Sign-Offs

4.17 Once the Committee has achieved consensus or there has been a decision to proceed without consensus, the draft procedure will be reviewed by PDSB departments as identified in the Procedure Development and Review Work Plan. In addition, the following department will be required to sign-off on the proposed draft procedure:

a) Legal and Governance Services to assess risk and ensure compliance with all Ministry directives and legislative requirements.

4.18   The Associate Directors and any of their designates, and the Executive Lead Human Rights will act as a resource to the Responsible Office, and if requested, will review any draft procedure and provide feedback.

4.19   The Responsible Office will review and consider the feedback collected and revise the draft procedure as required.

4.20   Once each office has reviewed the policy they must sign-off (Appendix C - PDSB's Procedure Review and Sign-off Sheet) on the procedure before it is presented to Director's Council for their review.

Stage 7: Approval

4.21   Following legal review, the Responsible Office will present the revised draft for feedback and approval from Director's Council. The Committee will prepare a Board Report on the procedure and append the draft procedure. Where applicable, the Board Report should indicate whether there has been revisions/amendments to an existing procedure or if the draft procedure is a full replacement of an existing procedure and specify any procedures that need to be repealed.

4.22   Director's Council will review the procedure and may make suggestions or recommendations for revision. The procedure may come back to the Director's Council as many times as needed.

Stage 8: Communications

4.23   Once approved by Director's Council, the procedure will be forwarded to the Policy Analyst for publication on the PDSB websites. The Policy Analyst will add the approval date and any other required information as per the Procedure Template. The Responsible Office will also notify the system.

Stage 9: Implementation

4.24   The Responsible Office will prepare an implementation plan in consultation with the Committee and Director's Council.

4.25   The Responsible Office will ensure that substantive changes to Board procedure are reflected in all appropriate department documents (e.g., guidelines, resources).

Stage 10: Maintenance and Review

4.26   The Responsible Office will monitor the implementation of the Procedure.

5. Roles and Responsibilities

5.1   Responsible Office

a) Ensure that the procedure review and development meet the requirements of this procedure.

b) Ensure the content of procedures align with the expectations set out in the parent policy.

c) Interpret policies and procedures.

d) Review procedures regularly to determine whether any gaps exist.

e) Propose new procedures, substantive amendments to existing procedures or the repeal of procedures to Director's Council.

f) Propose housekeeping amendments to existing procedures to the Governance Officer.

g) Create implementation strategy for new procedures.

h) Conduct post-implementation review of approved procedures.

6. Appendices

Appendix A – Procedure Development and Review Workplan

Appendix B – Procedure Development and Review: Consultation Workplan

Appendix C – PDSB's Procedure Review Sign Off Sheet

7. Reference Documents

Policy Development and Review Framework

Policy Development and Review Procedure

8. Revision History

Review Date	Approval Date	Description

PEEL DISTRICT SCHOOL BOARD
Procedure Development Work Plan

All procedures will be developed in accordance with the Procedure Development and Review Procedure, the Policy Development and Review Framework and the expectations set out in the Anti-Racism Policy, the Human Rights Policy and the Equity and Inclusive Education Policy.

Procedure Management
Proposed Procedure Title:
Parent Policy:
Responsibility:
Projected Director's Council Committee Meeting:

Stage 1: Identify the Need
☐ Procedure Development
☐ Procedure Review
☐ Ministry Mandated Procedure

Stage 2: Assessment and Prioritization

Rationale for Procedure: [brief summary]
Link to Procedure For Information Memo:

The For Information Memo was received by the Executive Lead, Associate Director, General Counsel, Controller or Chief Information Officer on [provide date].

Stage 3: Develop a Plan
Procedure Development and Review Committee Composition

Name	Position	Department	
*		Responsible Office	
		Legal and Governance Services	

*Chair of the Committee

Critical Path

Stage	Task	Responsibility	Deadline	Notes

Appendix A – Procedure Development and Review Workplan

Stage 4: Research
Evidence:

Sources of Information:

Findings from the environmental scan:

Stage 5: Draft
Link to consultation plan:

The draft procedure aligns with the Procedure Development and Review Template:
☐ Yes
☐ No

An environmental scan has been conducted and is included in this workplan.
☐ Yes
☐ No

Stage 6: Internal Reviews and Sign Offs
The draft procedure will include input from the following PDSB departments affected by the procedure:
-
-
-
-

In addition, the following department is required to sign off on the proposed draft procedure:
Legal and Governance Services.

Link to Procedure Review Sign Off Sheet:

Stage 7: Director's Council Approval
 The draft procedure will be submitted to Director's Council on: [insert date]
Link to Board Report:
Link to draft procedure:

The procedure received Director's Council approval on: [insert date]

Stage 8: Communications
Following Director's Council approval, the new Procedure will be communicated through:
- Posting of new Procedure on PDSB websites through the Policy Analyst
- Sharing with staff and stakeholders via appropriate mechanisms
- Communication to staff through Managers/Supervisors and school administrators through respective superintendents, as applicable

- Other:

Stage 9: Implementation
Link to Implementation Plan:

PEEL DISTRICT SCHOOL BOARD

Procedure Development and Review: Consultation Workplan

All procedures will be developed in accordance with the Procedure Development and Review Procedure, the Policy Development and Review Framework and the expectations set out in the Anti-Racism Policy, the Human Rights Policy and the Equity and Inclusive Education Policy.

Stakeholder Group(s)	Method(s) of Engagement	Timelines	Proposed Questions or Discussion Areas	Notes	Links to any resources or documents

PEEL DISTRICT SCHOOL BOARD
PROCEDURE REVIEW SIGN OFF SHEET

Procedure Title:

Parent Policy:

Responsible Office:

Policy Type: ☐New　　　　　　　☐Revised

Reviewed By:

Position/Department	Name	Signature	Date
[Lead – Responsible Office]			
[Legal and Governance Services]			
[Head(s) of Departments directly impacted by the Policy]			

Signatories confirm the following:

- The review of the draft procedure
- The accuracy of information and content related to their respective area of expertise

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

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

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.

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.

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

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 boa... supporting capital initiatives and building improvements. Reco... reports, requests and logs, environmental testing of facilities, ... facilities planning and improvements, capital and non-capital ... relating to property acquisition and disposition, building and o... 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
Assets & Property Management & Maintenance				
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 + 6, E= as long as building remains Board property	Destroy	• Building Code Act • Education Act

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				

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.	Freedom of Information, School, HR	E + 2 years E= appeal period expires+2 years	Destroy	PIB Ont.1, Ont.2, Ont. 4
Information Breaches Tracking sheets. Records relating to the resolution of breach.	Freedom of Information, Privacy, Records and Information Management	E + 2 years E = Final resolution of the breach + 2 years	Destroy	PIB Ont.1, Ont.2, Ont. 4
INFORMATION TECHNOLOGY				
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.	I.T. Services	E + 1 year E = termination of employee.		Operational

Record Series (Administration)	Accountability	Total Retention	Disposition	Citations/Comments
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.	I.T. Services	E + 1 year E = termination of employee.		Operational
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.	I.T. Services	E + 3 years E = Life of System		Operational

Record Series (Administration)	Accountability	Total Retention	Disposition	Citations/Comments
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.	I.T. Services	E + 1 year E= until ticket resolved		Operational
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. Also includes records on system installations/conversions and product evaluations. May also include requests for significant modification, fixes and upgrades.	I.T. Services	S + 2 years		Operational

Record Series (Administration)	Accountability	Total Retention	Disposition	Citations/Comments
Telecommunications Systems Records relating to the management, maintenance and use of telecommunications including landline and wireless mobile devices and equipment. Includes system documentation, configuration details and services provided	I.T. Services	E + 3 years E= life of system		Operational
MEETINGS MANAGEMENT				
External Meetings: Associations/ Organizations/ Government Includes reports, newsletters, publications, conference and workshop information and proceedings from meetings between the school board and external organizations.	Originating site	CY + 3 years	Destroy	
Internal Meetings: Administrative and Staff 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.)	Originating site or meeting chair	CY + 3 years	Destroy	

Record Series (Administration)	Accountability	Total Retention	Disposition	Citations/Comments
OFFICE SERVICES				
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	
RECORDS & ARCHIVES MANAGEMENT				
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.

Record Series (Public Engagement and Communications)	Accountability	Total Retention	Disposition	Citations/ Comments
EVENT MANAGEMENT				
Events 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	
MEDIA & PUBLIC RELATIONS				
Commendations, Awards & Recognition 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
Complaints 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.)	Communications or Site Specific	E + 1 year E = date of complaint	Destroy	PIB Ont.1, Ont. 2, Ont. 4
Contact and Mailing Lists 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.	Site Specific	S/O	S/O	PIB Ont. 4
Media Relations and News Releases Includes records regarding Board relations with the various media organizations. Records include press releases and information releases.	Communications	CY + 3 years	Archival Review	
News Reports Includes news reports from newspapers, magazines, websites and other publications regarding the board/authority, school, staff, students and trustees.	Communications	CY + 1 year	Archival Review	

Record Series (Public Engagement and Communications)	Accountability	Total Retention	Disposition	Citations/ Comments
Photographs Includes class photos, yearbook photos, and officials/trustees group photos.	Communications or Site Specific	CY + 1 year	Archival Review	PIB Ont. 4
Public Relations 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	
Publications Includes all publications produced for the Board by the Communications Department	Communications	S/O + 5 years	Archival Review	
Speeches and Presentations 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
SCHOOL PERSONAL COLLECTIONS				
Memorabilia 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. For Photographs See: Media & Public Relations - Photographs	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.

Record Series (Facilities and Environmental Support)	Accountability	Total Retention	Disposition	Citations/ Comments
ASSETS & PROPERTY MANAGEMENT & MAINTENANCE				
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
Record Series (Facilities and Environmental Support)	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**

Environment Assessments & Studies Includes information relating to soil, tree preservation and mitigation, geotechnical infrastructure expansion, water, air, and other environmental issues.	Facilities	Life of Board + 5 years	Life of Board + 5 years	Ont. 221, Ont. 332
Facilities Construction Projects 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. For Capital Projects Financing See: Capital Projects Financing For Final (As-Built) Drawings See: Drawings & Specifications	Facilities	E + 6 years E = completion of project	Destroy	Ont. 8, Ont. 10, Ont. 15, Ont. 124, Ont. 194

Record Series (Facilities and Environmental Support)	Accountability	Total Retention	Disposition	Citations/Comments
Facilities Improvement Projects Includes project records regarding the building improvements program and supporting documents specific to additions, renovations, and alterations to schools and buildings. Records include project drawings, project plans, meeting minutes, project updates, budgets, etc. For Final (As-Built) Drawings See: Drawings & Specifications	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
Facilities Planning Includes records regarding the allocation of classroom and workspace to staff and students. Records include correspondence, proposed enrolment studies and reports, facilities use plans, facilities designs and layouts, furniture layouts, etc.	Facilities	CY + 3 years	Destroy	

Record Series (Facilities and Environmental Support)	Accountability	Total Retention	Disposition	Citations/Comments
Maintenance and Operations: Buildings/ Physical Plant and Equipment Includes records related to support the maintenance and operations of buildings, physical plant and equipment. Includes office equipment.	Facilities	E + 5 years E = disposal of facility or equipment	Destroy	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
Maintenance and Operations: Grounds Maintenance requisitions, work orders, logs and reports showing actions taken re grounds keeping, snow clearance, and cleaning.	Facilities	E + 2 years E = completion of inspection or completion of maintenance	Destroy	Ont. 34
Land Surveys Includes land survey information such as legal property surveys, construction layout and control surveys, and field notes.	Facilities	S/O	Archival Review	
Parking Records related to parking at sites.	Originating Site	CY + 1 year	Destroy	Ont. 192, Ont. 193

Record Series (Facilities and Environmental Support)	Accountability	Total Retention	Disposition	Citations/Comments
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.	Facilities	E + 2 years E = when permit expires	Destroy	PIB Ont. 1, Ont.2, Ont. 4, Ont. 34
HEALTH, SAFETY & SECURITY				
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.	Human Resources	CY + 6 years	Destroy	Ont. 5, Ont. 43, Ont. 137, Ont. 210, Ont. 211, Ont. 212, Ont. 214
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: Training & Skills Development	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
Emergency Plans and Procedures 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.	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
Hazardous, Biological, Chemical or Physical Agents Includes records regarding the monitoring or hazardous chemical & physical agents, and designated substances in accordance with the Occupational Health & Safety Act. NB includes air quality reports, and excludes exposure records.	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
Designated Substances & Hazardous Materials – Waste Monitoring and Management Includes records related to the management and disposal of chemical, biological or physical agents or substances.	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
Health and Safety Incident Reports (Board Office) Health and Safety Incident Reports (kept at each school) Includes general records relating to incidents that affect health and safety of staff. For example emergency response, school illness, infections, quarantines, etc. Records include reports, correspondence and summaries, information related to actions taken by staff. For Serious Student Incidents See: Student Discipline See also: HUM Employee Incident/Accident Reports For Accident Reports See: Accident/Incident Claims and Reports For Claims/Litigation See: Legal Claims/Litigation	Human Resources	E + 3 years E = No further appeal + 3 years for adults **Note:** If student is under the age of 21, records must be kept until 21st birthday	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 34, Ont. 132

Record Series (Facilities Management)	Accountability	Total Retention	Disposition	Citations/Comments
Occupational Health & Safety Includes general recorded information regarding the occupational health and safety of staff and students. Joint Health & 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. For Accident Reports See: Accident/Incident Claims and Reports For Claims/Litigation See: Legal Claims/Litigation	Facilities	CY + 3 years	Destroy	Ont. 33, Ont. 34, Ont. 37, Ont. 39, Ont. 40
Site Security Administration 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. Also includes school visitor book and contractor logs, etc. Excludes video surveillance system records.	Facilities	CY + 2 years	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 19

Record Series (Facilities and Environmental Support)	Accountability	Total Retention	Disposition	Citations/Comments
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
INSPECTIONS AND TESTING				
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
Logs and Inspection Reports: General	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

Includes all documentation to support the inspection and testing of buildings, equipment, physical plant and property.

Records include logs, inspection reports, year-end reports, equipment lists and locations.

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.

For Emergency Power Systems Inspections and Testing, See: Fire Protection Systems & Emergency Power Systems

For Fire Protection Logs and Testing See: Fire Protection Systems & Emergency Power Systems

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

Non-Board Funds 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.	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
FINANCIAL PLANNING				
Budgets 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.	Finance	FY + 6 years	Destroy	
Capital Projects Financing 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.	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
FINANCIAL REPORTING				

Audits - Financial Includes records regarding internal & external financial audits of accounts For Audited Financial Statements See: [Financial Statements (Audited)](#)	Finance	FY + 6 years	Destroy	Ont. 14, Ont. 99, Ont. 191, Ont. 225, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Record Series **(Financial Management)**	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
Enrolment & 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.	Finance	FY + 6 years	Destroy	Vital Ont. 14, Ont. 114, Ont. 225, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Financial Statements (Audited) Includes the balance sheet, income statement, statement of source and application of funds, and other audited financial statements.	Finance	Life of Board + 5 years	Life of Board + 5 years	Ont. 65, Ont. 198

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
Record Series (Financial Management)	**Accountability**	**Total Retention**	**Disposition**	**Citations/Comments**
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

Ledgers: General Includes all records in the books of original entry, whether maintained in book format or as a computer report.	Finance	Life of Board + 5 years	Life of Board + 5 years	Fed. 30, Fed. 37

Record Series (Financial Management)	Accountability	Total Retention	Disposition	Citations/Comments
Ledgers: Subsidiary Ledgers, Registers and Journals Includes all subsidiary ledgers, registers and journals such as payment and receipt journals, journal vouchers, payroll registers, purchase order registers, and year-end adjustments.	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Taxation Includes records documenting taxation such as gas surtax reports, income tax returns and sales tax tables. Also included Harmonized Sales Tax (HST), accounting and information on exemptions and refunds.	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
PAYROLL				
Payroll 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. Also includes T4's, TD's, and ROE's.	Finance	FY + 6 years	Destroy	PIB 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

Record Series (Financial Management)	Accountability	Total Retention	Disposition	Citations/Comments
Pension Contributions/ Support 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.	Finance	E + 6 years E = until pension is paid out to all beneficiaries	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
PROCUREMENT				
Tenders & Quotations Records regarding tenders & quotations obtained from suppliers of goods & services such as office supplies, construction & pest control. Requests for proposal, requests for quotations, specifications, bonds & all documentation regarding the selection process. Excludes vendors/suppliers/ caterers and contracts.	Finance	FY + 6 years	Destroy	Ont. 14, Fed. 6, Fed. 16, Fed. 17, Fed. 18, Fed. 19, Fed. 30, Fed. 38
Purchase Orders & Purchase Requisition Includes purchase requisitions, purchase orders and blanket orders authorizing the procurement of goods and services.	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 it 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, harassments incidents, etc.

Record Series (Legal and Governance)	Accountability	Total Retention	Disposition	Citations/Comments
AGREEMENTS/CONTRACTS ADMINISTRATION				
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
BOARD & COUNCIL ADMINISTRATION				
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

Record Series (Legal and Governance)	Accountability	Total Retention	Disposition	Citations/Comments
Standing & Ad Hoc Committees 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.	Director's Office Board Secretary	Life of Board + 5 years	Life of Board + 5 years	PIB Vital Ont. 1, Ont. 2, Ont. 4, Ont. 47
Trustee Records All records and relevant materials relating to position on Board.	Director's Office	E + 4 years E = end of term	Destroy	PIB Ont.1, Ont.2, Ont.4, Ont. 222
Trustees' Register Includes a register of the names, addresses and occupations of trustees, including the dates on which each became or ceased to be a trustee.	Director's Office	Life of Board + 5 years	Life of Board + 5 years	PIB Ont. 1, Ont. 2, Ont. 4
POLICIES, PROCEDURES, DIRECTIVES				
Government Guidelines/ Directives Includes correspondence, guidelines and information provided by government ministries.	Director's Office	S/O	Destroy	Ont. 68, Ont. 81, Ont. 83, Ont. 102, Ont. 108, Ont. 112, Ont. 119, Ont. 120, Ont. 157

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

Record Series (Legal and Governance)	Accountability	Total Retention	Disposition	Citations/Comments
Appeals & 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.	Corporate Services Director's Office	E = resolution of appeal or hearing No further appeal +3 years for adults **Note:** If the student is under the age of 21, records must be kept until 21st birthday		Ont. 1, Ont.2 , Ont. 4, Ont. 34
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: Accident/Incident Claims and Reports	Corporate Services	Life of Board + 5 years	Life of Board + 5 years	Ont. 34
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.	Originating Department	FY + 6 years	Destroy	PIB Ont. 1, Ont. 2, Ont. 4 Ont. 34, Ont. 223

Record Series (Legal and Governance)	Accountability	Total Retention	Disposition	Citations/Comments
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: Employee Incident/Accident Reports For WSIB/STD/LTD Claims See: Disability Management	Originating Department/ Legal	E + 3 years E = resolution of appeal or hearing. No further appeal +3 years for adults. **Note:** If student is under the age of 21, records must be kept until 21st birthday.	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 34
Legal Opinions/ Precedents Records include case law, correspondence, reports, and findings/opinions provided to requestor.	Originating Department Corporate Services	CCY + 10 years	Archival Review	
REAL PROPERTY MANAGEMENT				
Deeds & Titles Includes original deeds to any board owned property.	Corporate Services	E = 10 years E = until Property Disposed	Destroy	Ont. 224

Record Series (Legal and Governance)	Accountability	Total Retention	Disposition	Citations/Comments
Property Acquisition & 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.	Corporate Services	E = 10 years E = Until Property disposed	Destroy	Ont. 7, Ont. 224

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
COMPENSATION & BENEFIT ADMINISTRATION				
Benefit Plans Includes records regarding benefits offered to employees such as group insurance, dental plans, wellness & Employee Assistance Program (EAP). Includes brochures, rates, quotes, correspondence, explanatory documents, benefit rate changes & premium adjustments. Excludes Benefit Records of Specific Employees.	Human Resources	S/O + 1 year	Archival Review	
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: Pay Equity	Human Resources	FY + 10 years	Destroy	

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
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.	Human Resources	CCY + 5 years	Destroy	Ont. 132, Ont. 133, Ont. 134
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.	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
HEALTH & WELLNESS				
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).	Human Resources	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 **Note:** DO not store in the employee HR file.	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 36, Ont. 158, Ont. 159, Ont. 160, Ont. 161, Ont. 169, Fed. 22
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.	Human Resources	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	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 34, Ont. 217, Ont. 219

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

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
Harassment Complaints, Allegations and Investigations (Respect in the Workplace) 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.	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
Labour Certification Includes original documents concerning the certification of labour unions.	Human Resources	Life of Board + 5 years	Life of Board + 5 years	
Labour Relations & Negotiations, Union/NonUnion Includes records related to collective bargaining, e.g. final offers, memoranda of settlement, mediations, arbitrations and data used in preparation for bargaining. For Collective Agreements See: Union Collective Agreement/ Non-Union Terms & Conditions Administration	Human Resources	Life of Board + 5 years	Life of Board + 5 years	

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
Union Collective Agreement/ Non-Union Terms & Conditions Administration 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 & Negotiations.	Human Resources	Life of Board + 5 years	Life of Board + 5 years	

Record Series (Human Resources Management)	Accountability	Total Retention	Disposition	Citations/Comments
ORGANIZATIONAL PLANNING				
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	
RECRUITING & SELECTING				
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
STAFF MANAGEMENT				
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
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.	Human Resources **Note:** 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.	E + 10 years E = termination or retirement	Forward to HR on termination	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 207, Ont. 209
TRAINING & SKILLS DEVELOPMENT				
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.	Originating Department	CY + 3 years	Archival Review	

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.

Record Series (Planning and Research)	Accountability	Total Retention	Disposition	Citations/Comments
RESEARCH DESIGN & PLANNING				
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
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.	Research & Planning	CY + 10 years	Destroy	
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.	Planning	CY + 4 years	Destroy	
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.	Planning	CY + 10 years	Destroy	Ont. 55

Record Series (Planning and Research)	Accountability	Total Retention	Disposition	Citations/Comments
RESEARCH & OUTCOMES REPORTING				
Research Includes surveys, questionnaires and research dealing with a variety of topics such as Community and Parent research, Student research, Staff research, Curriculum & Program research, Student research and External research from external sources such as other institutions and graduate students.	Research	CY + 10 years Note: Research applications not approved – 1 year after last use	Archival Review	Ont. 4
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.	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
CURRICULUM DESIGN & PLANNING				
Program/Curriculum Guidelines 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. 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.	Program Services	S/O + 3 years S/O = last update	Destroy	Ont. 45
Courses of Study/Outlines Includes outlines of available programs including courses of study.	Program Services	S/O + 3 years S/O = last update	Archival Review	Ont. 45

Curriculum Projects, Programs, Planning, Proposals, and Review 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.	Program Services	S/O + 3 years S/O = last Ministry review or audit	Archival Review	Ont. 45
PROGRAMS DESIGN & PLANNING				
Program Development and Design 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.	Program Services	S/O + 3 years S/O = last update	Destroy	Ont. 45

Record Series (Program Design and Development)	Accountability	Total Retention	Disposition	Citations/Comments
Programs: Continuing Education 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.	Continuing Education	S/O + 3 years S/O = last update	Destroy	Ont. 45
Programs and Services: Community 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.	Program Services	CY + 3 years S/O = last update	Destroy	

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
STUDENT ADMISSION/ REGISTRATION/ENROLMENT				
Student Registration and Verification Forms Registration forms, data verification forms, applications for school entry or special programs such as French Immersion. Also may include "Release Form for use of student personal information."	Schools	CY + 2 years	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 114, Ont. 225
International Students – Admission, Enrolment and Registration 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.	Responsible Board-level staff	CY/FY + 6 years	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 64, Ont. 114, Ont. 225

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
Transfers, Admittances and Retirement 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.	Schools	CY + 2 years	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 64, Ont. 114, Ont. 225
Attendance & Enrolment Registers: Student 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.	Schools	CY + 2 years	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 64, Ont. 114, Ont. 225

STUDENT SUPPORT & WELLNESS				
Attendance Counselling 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.	Attendance Counsellor/ Social Worker	E + 10 years E = Student's 21st birthday	Destroy	PIB Ont. 1, Ont. 2, Ont. 4

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
Career Counselling/Guidance Services 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.	School	CY + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
Guidance Materials Includes brochures, calendars, description sheets and catalogues relating to career opportunities, external school programs, postsecondary education, private schools, and scholarships to support students.	School	S/O	Destroy	
Student Portfolio Individual Pathways Plan (IPP) 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.	School	E + 5 years E = retirement from school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41, Ont. 55

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
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.	School/Special Services Department	E + 10 years E = case closed	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4
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.	School	E + 1 year E = case resolved	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4
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.	School	E + 1 year E = end of home instruction period	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
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.	School/Special Services Department	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.	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 228

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
STUDENT ASSESSMENT & PROGRESS				
Individual Education Plans (IEP) 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.	School	S/O + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 53
Student Exams/Province-Wide Tests 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.	School	CY + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
Newcomer Student Assessments Includes assessments of individual newcomer students to determine their language background, immigration status, educational history, test results and recommendations for level placement and subjects.	School	E + 5 years E = retirement from school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41
Speech & Language Student Services Includes records of individual students who are referred to language/speech services, such as assessments, referral forms, test results, recommendations and programming suggestions.	Special Services/ School	E + 10 years E = when no longer receiving services	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 330
Psychological Services Records 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.	Student (Special Education) Services	E + 10 years E = when no longer receiving services	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4
Specialized Equipment Needs 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.	Special Education/ School	E + 5 years E = retirement from school	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4, Ont. 41

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
Student Health Includes medical and health information regarding students required for the care and treatment of students in the school setting. Includes pediculosis, medical emergency plans - Plan of Care, administration of medication plans, referral for care and other health related materials.	School	S/O	Destroy	PIB Ont. 1, Ont. 2, Ont. 3, Ont. 4
STUDENT RECORDS ADMINISTRATION				
Ontario Student Record (OSR) – Active Includes all content prescribed according to the Ministry of Education OSR Guidelines, board processes, and at the discretion of the principal. The following components of the OSR will be retained for five years after a student retires from school: • Report cards • The documentation file, where applicable • Record of accumulated instruction in French/ Indigenous as a second language • Additional information that is identified by the school board as appropriate for retention For OSR Components requiring 55-Year Postretirement Retention See: Ontario Student Record - Inactive	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
Office Index Card 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.	School	E + 55 years E = At retirement, final office index card for each school attended is retained for 55 years	Destroy	
Ontario Student Record (OSR) - Inactive 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 – Office Index Card)	Schools Records Department	E + 55 years E = retirement from Ontario school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 42
OSR Transfer Requests Requests received from other schools or school boards for Ontario Student Record.	Schools	CY + 2 years	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 114, Ont. 225

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

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
Timetables Includes course timetables for students, as well as course selection sheets for each semester. Also includes signed and dated forms authorizing students to add or withdraw from courses. Excludes School Course Calendars.	Schools	CY + 2 years	Destroy Subject to Ministry of Education Audit http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 114, Ont. 225
Supervised Alternative Learning (SAL) Records Includes records of individual students who make application to a SAL program.	Student Services/School	E + 5 years E = retirement from the school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41, Ont. 226
Student Marks 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.	School	E + 5 years E = retirement from the school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41
OYAP Participant Application Form Form for co-op students whose placement is within an apprenticeship trade.	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
Experiential Learning Student Records 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. SHSM Programs. Excludes: Experiential Learning Programs, Work Education Agreements.	School	E + 5 years E = retirement from the school	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 41
STUDENT DISCIPLINE				
Expulsions Safe School Incident Reporting Form Part 1, related documentation, and any correspondence, if relevant to the expulsion of a student. Filed in the OSR.	Schools	CY + 1 E + 5 years if expulsion is a result of a violent incident as defined in PPM 120 E = Date of Expulsion Report	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 227

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
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.	Schools	CY + 1 E + 3 years if suspension is a result of a violent incident as defined in PPM 120 E = Date of suspension report	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 227, Ont. 333
Incidents Not Resulting in a Suspension or Expulsion Safe School Incident Reporting Form Part 1, related documentation, and any correspondence. Filed in the OSR.	Schools	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.	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 227, Ont. 333
Threat Assessment Process Documentation Includes Follow-up Intervention Plan (filed with safe schools department or Board equivalent), Case Conference Form (filed in the OSR).	Schools Safe Schools Department or Board Equivalent	CY + 1 year May be retained longer at principal's discretion.	Destroy	PIB Ont. 1, Ont. 2, Ont. 4, Ont. 110, Ont. 111, Ont. 112

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
STUDENT ACTIVITIES & PROGRAMS				
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 http://www.edu.gov.on.ca/eng/policyfunding/forms.html#ec	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

Record Series (Student Services)	Accountability	Total Retention	Disposition	Citations/Comments
Student Extra-Curricular/Co-Curricular Activities 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.	School	CY + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4
Scholarships, Bursaries & Awards – Non-monetary 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. Also includes Ontario Scholar lists. See Also: Financial Management: Scholarship Funds, Bequests & Donations	Secondary Schools	CY + 1 year	Archival Review	PIB Ont. 1, Ont. 2, Ont. 4
Volunteer Programs 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).	School or Site	S/O + 1 year	Destroy	PIB Ont. 1, Ont. 2, Ont. 4

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	