

Aide Memoire Trustee /Senior Staff Retreat



2022

Forward Together: A Progressive Approach to Policy

GOALS



01 Lay the Foundation

For improved governance
and policy making

02 Reconnect

And rebuild relationships

03 Listen and Feel Heard

On issues of governance
and the policy review
process

04 Create a Safe Space

To share ideas for how we
work together



Sharing Circle

Opening and Sharing Circle

Elder Dumont welcomed everyone to the Algonquin Territory and invited them to join the circle. Through spiritual prayers of thanksgiving and personal stories, he spoke about being a teacher and leaving a mark in a good way in a country with a history of racism against Indigenous people. Elder Dumont encouraged participants to step away from their daily activities, listen to, and trust each other, reflect on their journey together, and consider the impacts of past actions.

WE HEARD



"WE" STATEMENTS

- care about students and want them to be competent learners and realize their full potential
- are grateful to be together again
- hope that progress can be made
- appreciate Elder Dumont's straightforward words and assistance with healing
- hope not to return to pre-pandemic practices and structures that treated learners differently
- want to take brave steps and move forward
- understand the past two years have not been easy for everyone
- recognize our student trustees are doing their best to help their peers
- acknowledge that we have made some good decisions as well as some decisions that were not so good
- know the people we work with matter more than the work itself
- use our power to improve things for students

Presentation

Forward Together: A Progressive Approach to Policy

Volume and Backlog

The OCDSB has 134 policies and 184 procedures to address legislation, regulations, standards, guidelines, governing principles, and aspirational statements. Another 3 policies and 9 procedures are currently in development. Policies vary from short 1-2 page documents containing high-level guiding principles and/or policy statements to long, detailed policies with operational details that may be better placed in a procedure.

By comparison, Toronto DSB has 76 policies and 145 procedures, and Thames Valley DSB has 75 policies and 156 procedures. Approximately 83% of our policies are over 5 years old, and since September 2020, the Board has approved three new or revised policies. At the current pace, it would take approximately 37 years to review policies that are 5 years or older. If the Board were to approve one policy per Board meeting, it would drop to 11 years. If the review was limited to policies 10 years or older it would take 26 years at the current rate, or 8 years if one policy was approved at each Board meeting.



Consultation

Consultation on policies varies and consideration needs to be given to developing standards of practice. For example, the Human Rights Policy took 29 months to draft and approve. There were 26 formal consultations, three parent, employee and student surveys, 21 Director's Executive Council, IEC, ACE, PIC, SEAC committee meetings, three Committee of the Whole meetings, and one Board meeting for an approximate total of 150 hours of meetings. The Safe Schools Policies have been under development for 32 months (to date) for approximately 220 hours of consultations and are not yet approved. This is not sustainable within the current resources allocated for policy. There are other models which maintain our strong commitment to engagement but allow for more focused timelines and different methodologies for collecting input.

Our current practice tends to invest a lot of time on the approval of the consultation plan and the mechanics of the process. Trustees are frustrated about the timing of opportunities they have to contribute to policy development/renewal versus approval of consultation plans. How can we continue to value voice and enhance the process?

Structure

The OCDSB has an established format for policies, but the content and style varies considerably. A shared understanding of policy purpose could help move away from the current variability which ranges from short 1-2 page documents containing high-level guiding principles and/or policy statements to long, detailed policies with operational details that may be better placed in a procedure. A review of other district practices provides some alternate approaches. For example, the Thames Valley District School Board (TVDSB) has practices in place that help to standardize both consultation and structure. Using a policy working group, they are able to address approximately 4-8 policies per month. They utilize a tracking sheet to help prioritize the work and post all policies under review on their website. The Board would benefit from a common understanding of the purpose and structure of policies which in turn could inform changes to the policy development and approval process.



Group Reflections

The Purpose of a Policy

The Key Elements of a Policy

- focus should be on what and why we have a policy and not how we will implement it;
- the purpose of the policy should provide a clear rationale for what people need to be accountable for;
- the reports to Board should include that rationale for staff's recommendations for key points in the policy;
- must be operational and sustainable;
- the scope should explain to whom and to what the policy applies and where the policy will affect the public (OPSBA);
- must be related to the mission of the school/board/Education Act;
- should be a set of guiding statements, values and principles for procedures to follow;
- policy should be aspirational and less subject to change;
- rationale must align with Ministry direction;
- the Ministry of Education directs school boards to implement policies with considerable procedural detail included in them;
- must be adapted to local needs;
- describe how the policy will be reviewed/assessed at a later date and how the achievement will be measured;
- the dates for approval and last revised are good tracking tools;
- much of the OCDSB concussion policy should be in a procedure;
- the Upper Grand concussion policy meets Ministry requirements without blurring the lines between policy and procedure. It includes links to guidelines;
- discussion on competing points in a policy should take place earlier in the process rather than waiting until the policy comes to COW or Board for final approval; and
- the TDSB policy provides a balance between Upper Grand and OCDSB.



Group Reflections

The Purpose of a Policy

How does the structure affect the usability?

- there should be a standard database for definitions with links in the policy rather than repeating definitions in numerous policies or, include the definitions later in the policy or, include them as a separate appendix;
- too many hyperlinks in a document can decrease its readability;
- place the references near the beginning of the policy rather than at the end;
- start with a strong rationale;
- use plain language;
- keep it concise and straight to the point – put the details in the procedure;
- the users of a policy are the Board and senior staff;
- complexity and simplicity impact usability;
- policy is our contract with parents and students;
- typical user goes to the procedure for details;
- you cannot account for every situation in every policy or procedure; and
- policy has to be realistic, not too prescriptive, and provide enough direction.

Which policy is more accessible?

- short, clear, easy to read policies are more accessible to the public than procedures;
- Facilities guidelines are good examples of accessible documents;
- don't expect policies to cover everything possible; and
- TDSB policy does not address responsibility, last review date, and evaluation.



Group Reflections

The Purpose of a Policy

Applying an Equity Lens to OCDSB Policy

- What equity considerations should be contemplated when developing, reviewing and approving policy?
- equity is a state of existence where we recognize the value and contributions of everyone including their identities and lived experiences;
- we need to move beyond equity to anti-oppression, human rights compliance, and indigenous rights and speak to proportional outcomes and impact;
- look at our own system to see what barriers are in place in older policies;
- include socio-economic barriers, access to and menu options for breakfast or lunch programs, accessibility for those with disabilities, gender diverse washrooms, student placement in the classroom for those with vision or hearing impairments, transportation, and availability for wifi for all students;
- allocation of resources to support a policy may continue to be a systemic barrier;
- need to bring in influential voices to uncover unintended consequences;
- use clear, simple language that can be understood and/or translated;
- consider the impact of poverty and immigration status;
- how do we get to hear the voices who are not at the table;
- who are the missing groups;
- the Ontario Human Rights Commission has a policy on competing human rights;
- do policies maintain the status quo or take on a motherhood approach; and
- don't assume that small inexpensive things are less important.



Group Reflections

The Purpose of a Policy

Applying an Equity Lens to OCDSB Policy

- who will be impacted and how are we addressing this;
- what are the equity and inclusion concerns? (accessibility, safety, culture, etc.)
- what are the financial and human resources required to implement the key aspects of the policy;
- how can we communicate the policy to reach the full diversity of people affected;
- the elimination of bias in the process must be eliminated;
- universal design (thinking of groups of learners disproportionately impacted);
- create an option for anonymous input for families who do not trust the system;
- partner with MLOs and key partnerships to get the voice of families – recording as well as written information);
- consider rural geographic locations;
- consider equity at the beginning of the policy development process; and
- language is a huge barrier for parents who are English language learners.

Identifying Opportunities for Enhanced Practice

- our current consultation process does not address getting to the voices who are not at the table;
- don't use the same consultation process all the time – ensure we consult with those most impacted;
- consider deliberative dialogue where small groups of diverse individuals exchange and weigh ideas and opinions about a particular issue in which they share an interest;
- need to ensure that those in power or those with the loudest voices are not speaking for others;
- not everything needs to be in a policy;
- presentation and review by our advisory committees; and
- focus on equity when drafting a policy.



Group Reflections

The Purpose of a Policy

Identifying Opportunities for Enhanced Practice

- policy analyst with expertise through different intersectionalities;
- ensure we have staff trained in equity and that they use an equity lens when reviewing and developing policy;
- consultation is front end loaded so that staff can use the input to draft the policy;
- present the procedure at the same time as to policy for better understanding of the big picture;
- focus on plain language;
- school councils and advisory groups are still a small representation of the district;
- many of our processes require strong literacy skills, technology skills, and time; and
- let parents know how a policy will affect them and why they should provide feedback.



Summary

The Purpose of a Policy



What is a Policy

- short, concise policies of no more than 3-4 pages are best;
- create a dictionary of definitions with hyperlinks in policies;
- start all policies with clear rationale/purpose and end goal for why the policy is necessary; and
- details on how to implement the policy should be in a procedure.



Applying an Equity Lens

- focus on human rights obligations and anti-oppression framework and not equity;
- the current way we do consultation is not in line with best practices moving forward;
- we need to build collaboration with groups and ask about unintended consequences of a policy;
- we need to find out who is impacted by policies rather than using a checklist of groups; and
- ask groups why they care about the policy and convince them that their voice is necessary.

Strategies

Is there a current policy that can support our need for change? Is there language that can be added to broaden the vision? Can something else be revised in the policy? Would a procedure better meet our needs? Can we consolidate or rescind any policies? Can we build in efficiencies when providing direction? Is seeking 100% perfection holding us back? Is 90% good enough? Are we trying to include too much in our policies? Is the excessive time spent on policies keeping us from doing other important work? How do we honour the voices we hear? Can we acknowledge the time we are spending on policies and trust each other to get the work done in a more efficient manner?

The Toronto District School Board's policy framework is an example of a 2-page document that sets out the governing principles for their board's policies. The TDSB also has a formal governance and policy committee to guide their work and a procedure that sets out the requirements for development, format and style, review, consultation, approval, and evaluation.

With respect to consultation, cognitive bias impacts the work we do. False consensus only considers the information we are presented with. Anchoring bias starts at the point where we give/receive information. We need to consider how to get the voices who are not coming to our table, for example, through random sampling, a targeted survey, consultation software on the District's website, and letting the community know about current and upcoming consultations.

Group Reflections

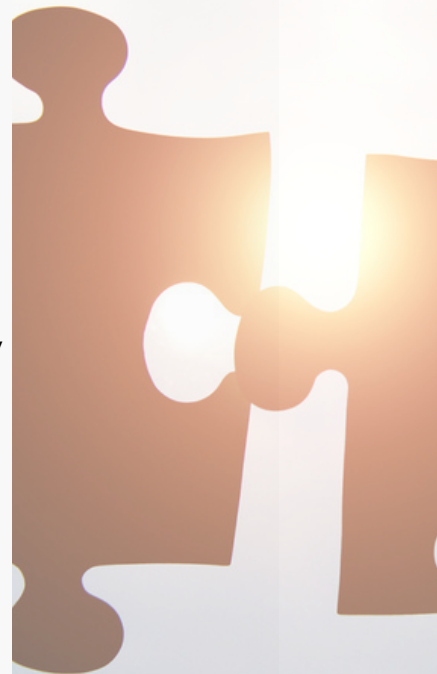
New Policy Process and Flow

Would a policy committee help address our policy backlog?

- consider a less formal policy working group with trustees and staff as members;
- consider a policy committee of trustees using the current committee structure;
- consider a second Committee of the Whole meeting with non-voting representatives to review four policies per month using a less formal debate structure;
- do not want another public COW meeting for policy work; and
- operational motions at the COW or Board table are frustrating.

What mandate should a policy committee have to help expedite the policy review process?

- to collaborate on new or revised policies;
- consider the Thames Valley DSB model for a policy committee;
- consider approving new policies for a six-month probationary period as working documents to assess the impact on the system and obtain input from the community (see York District School Board) include the mandate in the OCDSB policy on policies; consolidate policies; identify which policies require full consultation; and
- committee would provide the essence of the policy rather than crafting language and proposing and voting on amendments.



Group Reflections

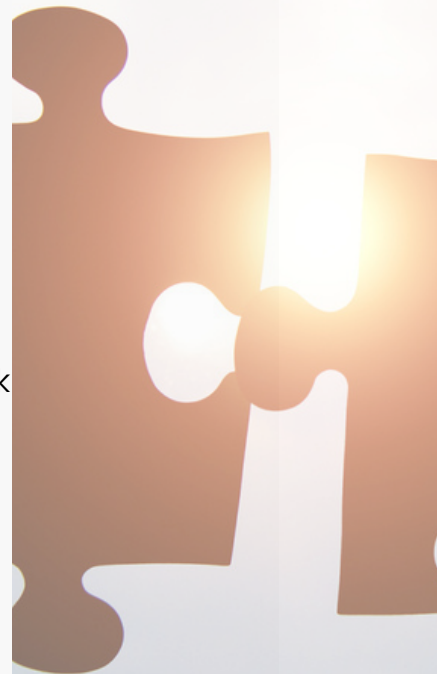
New Policy Process and Flow

What membership and reporting structure could optimize the policy review process?

- include staff as members;
- work with staff and include a subject matter expert at the table;
- consider 4–5 trustee members on the policy committee;
- allow all trustees who are interested to join the group rather than appointing them;
- rotate membership so everyone has an opportunity to participate;
- operate outside Kerr & King with respect to speaking times, etc.;
- provide reports of meetings to the Board or Committee of the Whole;
- if COW or Board does not agree with the policy, it can be sent back to the policy committee for further work rather than taking up time with amendments and sub-amendments;
- allow public to attend the meeting but not be permitted to speak;
- start small with simple policies to build trust and a feedback mechanism;
- student trustees should be invited to speak but are not required to attend;
- there needs to be transparency and communication about the work of the committee; and
- trustees can provide input through online surveys, other committees (i.e., ACE, PIC, IEC), speak with trustee members on the policy committee, or speak directly to staff.

How do you feel about shifting our current process for housekeeping amendments?

- consider whether housekeeping changes should fall within the mandate of the policy committee; and
- delegate housekeeping changes to staff.



Summary

New Policy Process and Flow



Breaking Through

- what we have now is not working for many reasons;
- fulfilling the mandate of the Board and maintaining public confidence has been jeopardized;
- there is currently a lack of trust and making a change will require a leap of faith;
- a new structure needs to build trust in the community that the decisions being made are reflective of their voice;
- consider rotating membership in a policy committee for 1-2 year terms to build trust;
- change the consultation structure to embody the voices of many people;
- consider which of the following opposing views would better address policy review requirements:
 - a working group or policy committee (product oriented approach) or;
 - a second COW meeting (process oriented approach) or
 - providing a greater opportunity for community voice;
- consider a pilot project (i.e., approving policies as "working documents" for six months to evaluate whether they are meeting the needs they were developed to address).

Next Steps

Reflections

- gratitude for the format, content and facilitation of the retreat and the ability to meet in person and get to know one another better;
- treating each other humanely and respecting individual differences are important when building relationships;
- we have to be satisfied with "good enough" in many places;
- we need to ask about unintended consequences when setting policy;
- while we may have different approaches, we are all here to "do stuff for kids";
- be patient and move forward incrementally;
- when the purpose gets clouded over and impedes the progress, trust erodes;
- good enough does not mean it is done, but we have taken a step forward and making a difference;
- time and energy are limited resources;
- policy is one way to make change in addition to procedures, budget, programs and other ways that affect students;
- everyone's voice matters;
- it takes courage to think about how to change yourself;
- this organization is open to change;
- be an advocate for time, efficiency and trust; and
- in the words of Rita Joe, a Mi'kmaq poet from Cape Breton, "My message is gentle. If one wishes to be healed, one must dwell on the positive".