



## Governance and Policy Committee Agenda

GPC:003A

Wednesday, March 24, 2021

4:30 p.m.

Electronic Meeting

### Trustee Members:

James Li (Chair), Michelle Aarts, Stephanie Donaldson, Harpreet Gill, Yalini Rajakulasingam, Anu Sriskandarajah

	<b>Pages</b>
1. Call to Order and Acknowledgement of Traditional Lands	
2. Approval of the Agenda	
3. Declarations of Possible Conflict of Interest	
4. Delegations	
To be presented	
5. P020, Transportation Policy Review: Status Update and Decision-Making Points [4059]	1
6. P023, Parent and Community Involvement Policy Review: Update [4048]	21
7. Teacher Hiring Policy: New Policy [4060]	31
8. PR515, Workplace Harassment Prevention and Human Rights Procedure: Revised Procedure [4061]	51
9. PR511, Excursions Procedure: Revised Procedure [4062]	117
10. Written Notice of Motion for Consideration	
10.1. Renaming Schools Celebrating the Diversity of Toronto (Trustee Rajakulasingam, on behalf of Trustee Smith and Trustee Mammoliti)	273
11. Adjournment	

Blank Page



## **P020, Transportation Policy Review: Status Update and Decision-Making Points**

**To:** Governance and Policy Committee

**Date:** 24 March, 2021

**Report No.:** 03-21-4059

### **Strategic Directions**

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

### **Recommendation**

It is recommended that the report be received.

### **Context**

The purpose of this report is to provide the Board of Trustees with an update, and seek policy direction, on the review of the Transportation of Students Policy (P020) (“the Policy”) (Appendix A).

The Transportation of Students Policy (P020) was adopted by the Board of Trustees on December 16, 1999 and last updated on October 27, 2005. The current Transportation of Students Policy is committed to the provision of safe and reliable transportation for resident students in accordance with the *Education Act*, section 21.

The Policy is being reviewed in accordance with the Policy Review Schedule approved by the Board of Trustees on February 6, 2019 and the Policy Review Process (Appendix B). Within this status update, staff have identified additional areas of the current Policy that require Board of Trustees directions; these decision-making points (Appendix C) are included with this report for the Committee’s consideration. It is important to note, that the decision-making points are suggested options that are

intended to initiate discussions and do not represent final recommendations in the review of this Policy.

While TDSB does work in partnership with TCDSB through the Toronto Student Transportation Group (TSTG), both boards “own” their policies. TSTG will be responsible for implementing the policy as agreed to by the Board though it is important to note that any changes to the policy may impact the number of buses needed and can impact our coterminous board.

## **Action Plan and Associated Timeline**

Based on the Governance and Policy Committee’s directions, staff will revise the decision-making points and bring the document back for decision at the next GPC. Following agreement on the decision-making points, staff will work with the Special Education/Inclusion and the Indigenous Education Department to prepare a draft revised Transportation of Students Policy (P020) and conduct public consultations for a period of 60-days. The draft Policy will subsequently be presented to the Governance and Policy Committee in the 2021 winter cycle for consideration.

## **Resource Implications**

No additional resources will be required for implementation of the revised Policy at this time.

## **Communications Considerations**

Following Board approval, the Policy will be communicated to the system and posted on the Board’s public website.

## **Board Policy and Procedure Reference(s)**

- Transportation of Students Procedure (PR504)

## **Next Steps**

Feedback on policy directions for the revision of the Transportation of Students policy, should be sent to staff by April 16, 2021. Staff would revise the decision-making points based on policy guidance received and present a report at the next meeting of the Governance and Policy Committee.

## **Appendices**

- Appendix A: Transportation of Students Policy (P020) - Current
- Appendix B: Policy Review Work Plan (P020)
- Appendix C: Decision-Making Points for Consideration (P020)



**From**

Craig Snider, Interim Associate Director, Business Operations and Service Excellence, at [craig.snider@tdsb.on.ca](mailto:craig.snider@tdsb.on.ca) or at 416-397-3188.

Marisa Chiu, Interim Executive Officer, Finance, at [marisa.chiu@tdsb.on.ca](mailto:marisa.chiu@tdsb.on.ca) or at 416-395-3563.

Garry Green, Senior Manager, Community, Business and Student Transportation Services at [garry.green@tdsb.on.ca](mailto:garry.green@tdsb.on.ca) or at 416-397-3883.

# Toronto District School Board

---

Policy P020

Title: **TRANSPORTATION OF STUDENTS**

Adopted: December 16, 1998

Revised: May 31, 2000, October 27, 2005

Review:

---

## 1.0 OBJECTIVE

To establish the criteria for the provision of student transportation and safety measures that will be taken

## 2.0 RESPONSIBILITY

The Director of Education holds primary responsibility for this Policy.

Within the Director's Office, the executive oversight and responsibility for the implementation, coordination and day-to-day management of the Policy is assigned to the Associate Director, Associate Director, Business Operations and Service Excellence.

## 3.0 POLICY

The Toronto District School Board is committed to the provision of safe and reliable transportation for resident students in accordance with the provisions of the *Education Act*, section 21. (2), and the administrative procedure section of this policy. The means of transportation for eligible students is by school bus, the provision of TTC tickets or by taxi.

### 3.1. Eligibility Criteria

#### (a) Distance

Transportation is provided to students who would otherwise be excused from attendance at a school because of distance as provided by the *Education Act*, section 21. (2), based on grade level as of September 1 of the school year.

- (i) Junior Kindergarten to Grade 5: 1.6 km or more\*
- (ii) Grades 6 to 8: 3.2 km or more\*
- (iii) Grade 9 to OAC: 4.8 km or more\*+

\*Distance to be measured from closest public thoroughfare of the residence of the student to nearest public access to the school building.

+ TTC tickets may be available depending on financial need.

(b) Medical Condition

Transportation may be provided, regardless of distance, for students who have a medical condition or disability that severely limits walking.

(c) Program Considerations

Transportation is provided:

- (i) for students who are placed by an Identification, Placement and Review Committee to a Special Education program that is not located in their home school and who meet the distance criteria in section 3.1 (a);
- (ii) for students who are placed in a program by the Toronto District School Board which is not offered in their home school and who meet the distance criteria in section 3.1 (a);
- (iii) for students attending a French Immersion program not offered in their home school and who meet the distance criteria in section 3.1 (a);
- (iv) for students who, for program purposes as stated in the *Education Act*, Section 190. (1), are required to attend another school during the course of the school day and who meet the distance criteria in section 3.1 (a);
- (v) for students who require treatment at an approved treatment facility during the course of the school day;
- (vi) for elementary students who are placed in a holding school by the Toronto District School Board which is located farther than a closer school offering the same program and who meet the distance criteria for JK to Grade 5 in section 3.1 (a).

(d) Alternative Attendance

Transportation is not provided for students attending any school or special program at their request, even when distance is a factor.

3.2. Method of Transportation

- (a) Transportation is provided to eligible students in Junior Kindergarten to Grade 5 by contracted carrier services (bus or van) or Board bus.
  - (i) School-to-school transportation would be offered.
  - (ii) Designated site-to-school transportation may be provided as a result of an Identification, Placement and Review Committee or for medical reasons.

- (iii) Special Education students in district-wide programs (formerly Metro-wide programs) will receive home-to-school transportation.
- (b) TTC tickets will be provided to eligible students from Grade 6 through to Grade 8 on parental /guardian request. Grade 6 students may be provided with bus transportation if the most direct TTC route requires more than one transfer. Students in Grades 9 to OAC may receive TTC tickets provided the distance and financial criteria are met.
- (c) Taxi service may be provided for eligible students in situations where it is warranted.

### 3.3. Summer School Transportation

Summer school transportation may be provided, either by school bus or TTC, for the following designated programs using the same eligibility criteria as stated in Section 3.1:

- (a) Ministry-funded Section 29 programs in treatment centres, hospitals, etc., that are an extension of the regular school year program.
- (b) Programs offered by the Toronto District School Board for Special Education students.
- (c) Students attending credit programs who are eligible for school bus transportation for medical reasons.

### 3.4. Appeal Process

Parents may appeal the decisions regarding transportation. All appeals will be made to the Transportation Department. Further appeal may be made in writing to the appropriate Supervisory Officer responsible for transportation who will forward it to the Appeal Committee.

### 3.5. Transportation Manual

A Transportation Manual will be developed to include procedures, guidelines and protocols for issues such as:

- Mandatory performance requirements
- Child care
- Staggered school hours
- Section 29 programs
- Cancellation of transportation
- Bus evacuation
- Empty seat procedures
- Accident reporting
- Safety

- Student conduct
- Medical conditions
- Consolidation of schools
- Glossary

3.6. Empty Seats

An procedure shall be established to provide a process for filling seats on school buses that are available after all eligible students have been accommodated.

#### **4.0 SPECIFIC DIRECTIVES**

The Director is authorized to issue operational procedures to implement this policy.

#### **5.0 REFERENCE DOCUMENTS**

Operational Procedure PR504, Transportation of Students

## POLICY REVIEW WORK PLAN

---

Date: [September 11, 2019](#)

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

### POLICY INFORMATION

Policy Title and Policy Number: [Transportation of Students Policy \(P020\)](#)

Review during fiscal year: [2019/2020](#)

Last reviewed: [October 27, 2005](#)

Director's Council member responsible for this Policy review: [Associate Director, Business Operations and Service Excellence](#)

### Phase I. PLANNING AND OBTAINING TRUSTEES' DIRECTIONS

This Policy Review Work Plan has been discussed with the Policy Coordinator:

☒ Yes

☐ No

This Policy Review Work Plan will be discussed at the Governance and Policy Committee meeting held on: [September 11, 2019](#)

### Phase II. REVISIONS

#### Formatting Changes

The Policy will be reformatted to ensure alignment with the current Policy Template (Operational Procedure PR501, Policy Development and Management, Appendix A):

☒ Yes

☐ No

#### Content Changes

The Policy requires content revisions:

☒ Yes

☐ No

The content changes are due to the following reason(s):

- ☐ Legislation
- ☒ Government directives/policies
- ☒ Board decisions
- ☒ Multi-Year Strategic Plan requirements
- ☒ Operational requirements
- ☒ Simplify and/or update using plain language
- ☒ Alignment with Equity Policy

Detailed information on the proposed content changes, including findings of the policy equity assessment:

As part of the Policy review the following provisions are proposed for consideration:

- As per the MYSP, consider expanding liaising with partner agencies on initiatives related to implementing “active, safe, and sustainable transportation programs” for a greater number of schools within the TDSB system. This includes supporting endeavours such as Board-wide Walk to School days; school biking initiatives (e.g., through installing bike racks); and working with community stakeholders to develop safety protocols for responding to student accidents and other transportation hazards.
- Consider provisions on maintaining a high level of communication between stakeholder groups (such as students, teachers, parents, community organizations, municipalities, transportation consortia, and co-terminus boards). This may include asking for stakeholder input on guidelines for bus-to-home communication, informed bus route decision-making, regional protocols for school bus cancellations, and maximum commute times.
- Consider provisions emphasizing a more community driven approach to active transport to school. The role of the neighborhood has the potential to influence safety perceptions, which could contribute to alleviating a major concern with regard to Active School Transportation (ATS).
- Consider provisions that ensure transportation of students is equitable (as per the TDSB Equity Policy and framework) and does not create barriers to entry to academic programs.
- Consider the Learning Opportunities Index (LOI) when drafting provisions related to equity of access and school busses.
- Consider French Immersion school bussing. Provision 3.1 C (iii) of the current Policy will need to be updated based on the Board’s direction of French Immersion bussing.
- Consider additional provisions on maintaining a high level of safety within school zones and school buses. This may include providing adequate crossing guards and secure and safe bike storage; work with municipalities to prioritize

infrastructure improvements; minimise the number of private vehicles near school grounds; and use pavement markings/signage to promote safety for pedestrians and cyclists.

- Consider installing cameras on school busses for safety and security, while ensuring protection of privacy is maintained in accordance with appropriate legislation.
- Consider expanding student tracking tools such as installing Radio Frequency Identification tags (RFID) on school busses.
- Consider ensuring all school busses are accessible as per AODA requirements.
- Consider implementing appropriate measures related to behaviour on school buses (e.g., monitoring and reporting inappropriate behaviour).
- Consider clarifying and outlining the appeal processes related to incidents on school busses.
- Consider provisions on requiring mandatory seat belts on school busses.
- Consider embedding provisions on courtesy seating and empty seats on school busses.
- Consider reevaluating eligibility requirements for school bussing (e.g., distance threshold, public transport options, and age/grade limitations).
- Consider improving and optimizing school bus service levels to minimize commute time for students.
- Consider bell time management to optimize school transport. Optimizing school transport may also lower economic and environmental costs associated with bussing.

☒ A review of leading practices for similar policies across jurisdictions has been completed and is included with this Work Plan.

### **Phase III. INTERNAL REVIEWS AND SIGN-OFFS**

The Policy review will include TDSB divisions affected by the Policy:

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

In addition, the following departments will be required to sign-off on the proposed Draft Policy:

- ☒ Legal Services



- ☒ Governance and Board Services
- ☒ Government, Public and Community Relations

A sign-off from the Director of Education will be obtained before proceeding with external consultations and/or Committee/Board approval.

- ☒ Director of Education

#### Phase IV. EXTERNAL CONSULTATIONS

Are external consultations applicable to this Policy?

- ☒ Yes
- ☐ No (*Ministry of Education mandated policy or corporate policy without external stakeholders*)

Mandatory external consultations will include, at a minimum:

1. Posting of the working draft Policy on TDSB website for public feedback (45 days minimum): [60 Days](#)

2. Extending invitations for consultation to:

- ☒ Student Senate

and

all Community Advisory Committees of the Board and conducting consultations with the Community Advisory Committees that expressed interest (either individually with each interested committee or collectively with representatives of all interested committees): [January – March 2020](#)

- ☒ Alternative Schools Community Advisory Committee
- ☒ Black Student Achievement Community Advisory Committee
- ☒ Community Use of Schools Community Advisory Committee
- ☒ Early Years Community Advisory Committee
- ☒ Environmental Sustainability Community Advisory Committee
- ☒ Equity Policy Community Advisory Committee
- ☒ French-as-a-Second-Language Community Advisory Committee
- ☒ Inner City Community Advisory Committee
- ☒ LGBTQ2S Community Advisory Committee

- ☒ Parent Involvement Advisory Committee (PIAC)
- ☒ Special Education Advisory Committee (SEAC)
- ☒ Urban Indigenous Community Advisory Committee

In addition to mandatory consultations, other external participants and projected dates of consultation(s) include:

- ☒ School Councils
- ☒ Professional Associations and Unions
- ☒ Other: Toronto Student Transportation Group (TSTG)

The following methods will be applied in the external consultations:

- ☐ Public meeting
- ☒ Facilitated focus group
- ☒ Call for public delegations
- ☐ Expert panel discussion
- ☐ Survey
- ☒ Posting on the TDSB website
- ☐ Other:

#### **Phase V. COMMITTEE/BOARD APPROVALS**

Following external consultations and revisions, the working draft Policy will be presented to the Governance and Policy Committee on the following date: [April-May 2020](#)

Following recommendation by the Governance and Policy Committee, the revised Policy will be presented to the Board on the following date: [May-June 2020](#)

Once approved, the revised Policy will replace the existing policy on the TDSB website.

#### **Phase VI. IMPLEMENTATION**

Following Board approval, the final revised Policy will be communicated through:

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

Policy implementation will include:

- ☒ Conducting information/training sessions to TDSB staff affected by the Policy

The projected time period for conducting information/training sessions to staff will be: [June – August 2020](#)

- ☒ Review of associated procedures or initiate development of new procedures: [June – August 2020](#)

[PR504 – Transportation of Students](#)

[PR557 – Behaviour on Buses Procedure](#)

## DRAFT DECISION MAKING POINTS: REVIEW OF TRANSPORTATION OF STUDENTS POLICY (P020)

### Definitions:

- *Board* refers to the Toronto District School Board, which is also referred to as the “TDSB”.
- *Board Property* or “*Board Premises*” refers to any TDSB land, premises, location or thing at, upon, in or near which a student learns or an employee works.
- *Bussing* refers to....
- *Courtesy Seating* refers to...
- *Empty Seat* refers to...
- *Radio Frequency Identification tags (RFID)* refers to...
- *TDSB* refers to the Toronto District School Board, which is also referred to as the “Board”.
- *TDSB Vehicles* refers to any vehicles owned, leased, or rented by the TDSB, and operated by Board staff.

### 1. Transportation for Special Education Programming

- Current: The TDSB will provide transportation to students placed by an Identification, Placement, and Review Committee to a Special Education Program that is not located in their home school and who meet the distance criteria set out by the Board

OR

- Option: For students who are placed by an Identification, Placement and Review Committee to a Special Education program that is not located in their home school and who meet the distance criteria set out by the Board, with the exception of students in a Gifted program that is not offered at their home school.

### 2. Transportation for French-Immersion Programming

- Current: The TDSB will provide transportation for students attending a French Immersion program not offered in their home school and who meet the distance criteria

OR

- Option: The TDSB will not offer transportation to students who attend a French Immersion program

### 3. Distance Criteria

- Current: Transportation is provided to students who would otherwise be excused from attendance at a school because of distance as provided by the *Education Act, section 21. (2)*, based on grade level as of September 1 of the school year. (i) Junior Kindergarten to Grade 5: 1.6 km or more\* (ii) Grades 6 to 8: 3.2 km or more\* (iii) Grade 9 to Grade 12: 4.8 km or more\*+ \*Distance to be measured from closest public thoroughfare of the residence of the student to nearest public access to the school building.

OR

- Option: Transportation is provided to students who would otherwise be excused from attendance at a school because of distance as provided by the Education Act, section 21. (2), based on grade level as of September 1 of the school year. (i) Junior Kindergarten to Grade 3: 1.6 km or more\* (ii) Grades 4 to 6 3.2 km or more and Grade 7-12 : 4.8 km or more\*\*+ \*Distance to be measured from closest public thoroughfare of the residence of the student to nearest public access to the school building.\*\* Grade 7-12 will qualify for TTC only.

### 4. Appeal Process

- Current: Parents may appeal the decisions regarding transportation. All appeals will be made to the Transportation Department. Further appeal may be made in writing to the appropriate Supervisory Officer responsible for transportation who will forward it to the Appeal Committee

OR

- Option: Parents may appeal the transportation decisions where there are accommodation needs or where there is a misinterpretation of policy. The process for appeals, including forms, will be provided in the accompanying procedures.

### 5. Summer School Transportation

- Current: Summer school transportation may be provided, either by school bus or TTC, for the following designated programs: (a) Ministry-funded ECPP (Section 29) programs in treatment centres, hospitals, etc., that are an extension of the regular school year program; (b) Programs offered by the Toronto District School Board for Special Education students; (c) Students attending credit programs who are eligible for school bus transportation for medical reasons

OR

- Option: The TDSB will not offer school transportation for designated summer school programs.

## **6. Transportation Manual**

- Current: A Transportation Manual will be developed to include procedures, guidelines and protocols for issues such as:
  - Mandatory performance requirements
  - Childcare
  - Staggered school hours
  - Section 29 Programs (ECP)
  - Cancellation of transportation
  - Bus evacuation
  - Empty seat procedures
  - Accident reporting
  - Safety
  - Student conduct
  - Medical conditions
  - Consolidation of schools
  - Glossary

OR

- Option: The procedures will outline the Transportation Manual, guidelines and protocols for implementation of student transportation. The Manual will be reviewed annually.

## **7. Transportation for Indigenous Education Programming**

- Option 1: The TDSB will offer transportation to Indigenous students who meet the distance criteria regardless of whether they attend an Indigenous Education Program.

OR

- Option 2: The TDSB will offer transportation to students who attend an Indigenous Education Program not offered at their home school who meet the distance criteria.

## 8. Transportation for Education and Community Partnership Program (formerly Section 29)

Option 1: The TDSB will offer transportation to students who attend an Education and Community Partnership Program (ECPP) not offered in their home school and who meet the distance criteria

OR

Option 2: The TDSB will not offer transportation to students who attend a Education and Community Partnership Program (ECPP) program.

## 9. Staggered School Times

- Option 1: The TDSB may alter school start and end times to reduce the number of busses required to transport students. School start times are not to be altered by more than 30 minutes. The process for altering bell times is as outlined in the Student Transportation procedures.

OR

- Option 2: *FOR SCHOOLS SERVED BY STUDENT TRANSPORTATION:* The TDSB may alter school start and end times to reduce the number of buses required to transport students. School start times are not to be altered by more than 30 minutes. The process for altering bell times is as outlined in the Student Transportation procedures.
- *FOR SCHOOLS NOT SERVED BY STUDENT TRANSPORTATION:* Once it is determined that a school will not be served by any student transportation services for the coming year by verifying through the student transportation office, a principal may adjust their bell times by up to 30 minutes by following the process as outlined in the Student Transportation procedures.

## 10. Transportation Hazards Criteria

- Option 1: As part of the eligibility for student transportation, the Board will develop hazard criteria to be considered when assessing applications. These criteria will be outlined in the accompanying procedures.

OR

- Option 2: The Board will consider transportation hazards on a case by case basis.

**11. Misconduct on School Busses**

- Option 1: The TDSB will develop and implement appropriate guidelines and procedures related to misconduct on school buses including roles and responsibilities and consequences.

OR

- Option 2: The TDSB will develop and implement appropriate guidelines and procedures related to misconduct on school buses including roles and responsibilities and consequences.
- A separate procedure related to misconduct on school busses will be developed for Indigenous students in consultation with Indigenous Education programs of the Board and relevant stakeholders.

**12. Privacy, School Busses and Tracking**

- TDSB school busses may have cameras installed for safety and security purposes. Privacy will be protected in accordance with appropriate legislation and TDSB Policies (e.g., Freedom of Information and the Protection of Privacy Policy – P094 and the Acceptable Use of Information Technology Resources Policy – P088). Parents will be notified each September of the possibility of cameras and other tracking on buses, as well as the protections for the storage and use of said devices, as part of their school start up package.
- The TDSB may utilize safety and/or tracking tools, such as Radio Frequency Identification tags (RFID), or other means to ensure student safety, on school busses. Privacy of all students will be protected in accordance with appropriate legislation and TDSB Policies (e.g., Freedom of Information and the Protection of Privacy Policy – P094 and the Acceptable Use of Information Technology Resources Policy – P088). Parents will be made aware of any school that is using these tools as part of their school start up package.

**13. Equity and Transportation**

- The TDSB will ensure that the transportation of all students is equitable as per the TDSB Equity Policy (P037). Where there is financial hardship, or other unique circumstances, students may appeal to their principal for support for TTC or appeal to the Transportation Department.



**14. School Buses and AODA**

- All distributed information related to school busing whether sent electronically or in paper format will be delivered in a manner that is compliant with AODA and other appropriate legislation. TDSB will also comply with all other AODA provisions and appropriate legislation, and related TDSB Policies (e.g., Accessibility Policy – P069).

**15. Empty Seats/Courtesy Seating Procedure on School Busses**

- Option 1: The TDSB will establish an empty/courtesy seating procedure to outline processes for filling seats on school buses that are available after all eligible students have been accommodated.

OR

- Option 2: The TDSB will not provide courtesy/empty seats.

**16. Partner Agencies and Transportation Programs**

- As per the Multi Year Strategic Plan, the TDSB will liaise with partner agencies on initiatives related to active, safe and sustainable transportation. Procedures will outline the consultation, implementation and protocols for operating and expanding these programs.

**17. Suspension of Provisions of this Policy**

- Due to unforeseen circumstances, such as public health emergencies, extreme driver shortages, or other emergencies, the Board may need to suspend all or certain provisions of this Policy, with proper committee and Board approvals, to ensure the safety of students and/or the continuity of service.
- The Board may choose to have a staggered implementation to the school start up in order to facilitate a smoother start up. These options will be outlined in the accompanying procedures.

**Blank Page**



## **P023 - Parent and Community Involvement Policy Review Update**

**To:** Governance and Policy Committee

**Date:** 24, March 2021

**Report No.:** 03-21-4048

### **Strategic Directions**

- Transform Student Learning
- Create a Culture for Student and Staff Well-Being
- Build Strong Relationships and Partnerships Within School Communities to Support Student Learning and Well-Being

### **Recommendation**

It is recommended that the revised Critical Path and Work Plan for the Parent and Community Involvement Policy (P023), as presented in this report be approved.

### **Context**

The Parent and Community Involvement Policy (P023) (the “Policy”) was adopted on November 25, 1998 and most recently revised on February 3, 2010. The Policy outlines the framework for building and supporting parent and community involvement in the TDSB, including establishment of the Board’s Community Advisory Committees (CACs).

The Policy is being reviewed in accordance with the Policy Review Schedule and the policy review process approved by the Board of Trustees on February 6, 2019. The scope of the review will also address the direction of the Board of Trustees of December 4, 2017, requiring Director of Education to review mandates of the Board’s CACs and present report with recommendations.

This report is to provide an update on the Critical Path and Work Plan that was received by the Board on February 05, 2020. Since the last update, COVID-19 and the Ministerial Order from the Minister of Education, ordering school boards to close from March 14 through to April 5, 2020 resulted in the postponement of all face-to-face consultation sessions.

## Agenda Page 22

Prior to the postponement of consultations, the P023 review was launched online at [www.tdsbengage.ca](http://www.tdsbengage.ca) on February 20, 2020 and off-line (face-to-face) on February 25, 2020. As the hub of the review, [www.tdsbengage.ca](http://www.tdsbengage.ca) features the P023 survey, schedule of consultation dates, background information on the review process, frequently asked questions (FAQ), links to other TDSB sites and an IDEAS tool that solicits recommendations on the policy from the public. Off-line consultations (face-to-face) to date have entailed four (4) ward consultations representing 10 wards, 2 CACs and two Model School for Inner City, stakeholder session.

The CAC review had commenced and trustees, staff leads, trustees and members of CACs have had an opportunity to complete an anonymous online survey. CAC members have also been invited to provide feedback on the specific focus of their CAC, and community engagement, online or at one of their meetings. The analysis of the survey results, Summary of Board Decisions and other information such as an environmental scan will inform the revision of the policy statements related to CACs.

### **Action Plan and Associated Timeline**

Subject to the Governance and Policy Committee and Board directions, the review processes will be separated by focusing on the CAC review for completion this school year and the larger P023 review for completion April-May 2022 thereby, allowing for a more thorough review of both processes, while managing staff workload. An update of the Work Plan and Critical Path for CACs and P023 can be reviewed in the Appendix.

### **Resource Implications**

The contract for the Bang the Table Engagement HQ platform secured through the Boards Request for Quotation (Policy 017 – Purchasing) has expired and will be renewed for another year. This tool has enabled us to create [www.tdsbengage.ca](http://www.tdsbengage.ca) an online hub for the P023 consultation. It offers an array of modern online engagement tools ranging from forums, ideas and places (geo-spatial polling) to polls that has enhanced our online capabilities for gathering insight from varying stakeholders.

### **Communications Considerations**

Government, Public and Community Relations will be consulted for the drafting of a communications plan.

In addition, the revised Parent and Community Involvement Policy (P023) will be posted on the Board's internal and external website and communicated through the System Leaders' Bulletin.

**Board Policy and Procedure Reference(s)**

- Community Engagement Policy (P078)
- Parent and Community Involvement Procedure (PR558)
- Parent and Community Involvement Policy (P023)

**Appendices**

- Appendix A - PO23 - Critical Path
- Appendix B - P023 - Parent and Community Involvement Policy Review Work Plan

**From**

Curtis Ennis, Interim Associate Director, Equity, Well-Being and School Improvement, at [curtis.ennis@tdsb.on.ca](mailto:curtis.ennis@tdsb.on.ca) or 416-397-3187.

Michelle Munroe, Central Coordinator Parent Engagement at [michelle.munroe@tdsb.on.ca](mailto:michelle.munroe@tdsb.on.ca) or at 416-397-3528.

**P023 - CRITICAL PATH****P023 REVIEW CORE PRINCIPLES**

- Centring- voices that have been institutionally marginalized,
- Acknowledging-families do not belong to just one category or social location but have identities that are complex and multiple; fluid rather than fixed,
- Tailoring-ensuring that consultation model/tools meets the needs of specific target audiences.

**COMMUNITY ADVISORY COMMITTEE CRITICAL PATH**

Task	Timeline
Review Data collected	March 2021
Wrap-up CAC focus group ((review and refine findings)	April 2021
Trustee focus group (review and refine findings)	
Data synthesis and analysis	May 2021
GPC Report	June 2021

**P023-CRITICAL PATH**

<i>Website Engagement</i>	April 2021
<ul style="list-style-type: none"> <li>• Reactivation of planning committee</li> <li>• Renewal of <a href="http://www.tdsbengage.ca">www.tdsbengage.ca</a> platform</li> <li>• Relaunch <a href="http://www.tdsbengage.ca">www.tdsbengage.ca</a> for platform for survey and polling</li> <li>• Website shared with Student Senate</li> </ul>	May-June 2021

<p><i>Virtual Stakeholder Conversations</i></p> <ul style="list-style-type: none"> <li>• Online discussion forum co-hosted by staff and PIAC</li> <li>• Wrap-up Ward Consultations</li> <li>• Wrap-up Community Advisory Committee focused sessions</li> <li>• Wrap-up Model School Focus Groups - LC1/2/4)</li> <li>• Convene stakeholder Conversations with congregated sites, Deaf/hard of hearing &amp; Indigenous (determined by UIEC), secondary parents/caregiver &amp; Settlement Workers</li> <li>• Staffing Groups &amp; Unions (e.g. teachers, TSAA etc.)</li> <li>• School Councils</li> </ul>	<p>September - December 2021</p>
<p>Synthesis &amp; Analysis</p> <ul style="list-style-type: none"> <li>• Collection and review of all data</li> <li>• Development of Key policy directives</li> <li>• Vetting of policy directives with PIAC</li> </ul>	<p>January 2022</p>
<p>External Consultation on Policy Directives</p> <p>Public Delegations</p> <ul style="list-style-type: none"> <li>• Two LC sessions (LC 1&amp;3/2&amp;4)</li> <li>• Posting on <a href="http://www.tdsbengage.ca">www.tdsbengage.ca</a> &amp; TDSB website</li> </ul>	<p>January - February 2022</p>
<p>Committee Board Approvals</p>	<p>April - May 2022</p>

## POLICY REVIEW WORK PLAN

---

Date: March 24, 2021

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

### POLICY INFORMATION

Policy Title and Policy Number: [Parent and Community Involvement Policy \(P023\)](#)

Review during fiscal year: [2018/19](#)

Last reviewed: [July 13, 2005](#)

Director's Council member responsible for this Policy review: [Associate Director, Equity, Well-Being and School Improvement](#)

### Phase I. PLANNING AND OBTAINING TRUSTEES' DIRECTIONS

This Policy Review Work Plan has been discussed with the Policy Coordinator:

- ☒ Yes  
☐ No

This Policy Review Work Plan will be discussed at the Governance and Policy Committee meeting held on: [March 24, 2021 \(Revised work plan being presented for approval re: P023 review and associated timelines\)](#)

### Phase II. REVISIONS

#### Formatting Changes

The Policy will be reformatted to ensure alignment with the current Policy Template (Operational Procedure PR501, Policy Development and Management, Appendix A):

- ☒ Yes  
☐ No



## Content Changes

The Policy requires content revisions:

- ☒ Yes
- ☐ No

The content changes are due to the following reason(s):

- ☐ Legislation
- ☒ Government directives/policies
- ☒ Board decisions
- ☒ Multi-Year Strategic Plan requirements
- ☒ Operational requirements
- ☒ Simplify and/or update using plain language
- ☒ Alignment with Equity Policy

Detailed information on the proposed content changes, including findings of the policy equity assessment:

Review the scope of the revised Policy, to enhance and explore:

### Evaluation of Parental Engagement Activities

- Evaluating current parental engagement activities and developing measures to improve their overall effectiveness

### Parent and Community Engagement in the School Improvement Process (SIP)

- At its meeting on November 28, 2018 the Board approved that policy and procedures be developed to create the way by which parents, students, community and trustees are informed and involved in the School Improvement Process.

### Consideration of Parent Engagement Standards

- Embed the MYSP-Build Strong Relationships and Partnerships Within School Communities to Support Student Learning and Well-Being by exploring engagement standards for the system.

### Community Advisory Committees (CACs)

- Consider revision of the governance model for Board's (CACs) through alignment with the:
  - Equity Policy;
  - mandate of CACs as per Board directions from December 4, 2017 (please see appendix B for reference).
  - Board's Multi-Year Strategic Plan and its five key goals:
    - (1) Transform Student Learning;
    - (2) Create a Culture for Student and Staff Well-Being;

## Agenda Page 28

- (3) Provide Equity of Access to Learning Opportunities for All Students;
- (4) Allocate Human and Financial Resources Strategically to Support Student Needs;
- (5) Build Strong Relationships and Partnerships within School Communities to Support Student Learning and Well-Being;

- ensuring that the CACs role, membership and reporting relationship with the Board are clearly defined;
- adopting a common CAC governance model;
- ensuring that that CAC mandates and terms of reference are consistent with the Board's Bylaws, policies and procedures.

### Definition and Usage of the term Parent or Family

- Align with the Boards Equity Policy, Ontario Human Rights Family Status Code grounds, the Ontario Humans Rights Commission directives and the Truth and Reconciliation Recommendations.

### Separating Community Engagement & Family Engagement

- Consider parent engagement as outlined within the *Parent Engagement Policy for Ontario Schools*.

### Volunteers

- Define the role of volunteers
- Explore guidelines for volunteering that aligns with TDSB's best practices.

☒ A review of leading practices for similar policies across jurisdictions has been completed and is included with this Work Plan.

## Phase III. INTERNAL REVIEWS AND SIGN-OFFS

The Policy review will include TDSB divisions affected by the Policy: [\[select applicable\]](#)

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

In addition, the following departments will be required to sign-off on the proposed Draft Policy:

- ☒ Legal Services
- ☒ Policy Services
- ☒ Government, Public and Community Relations

A sign-off from the Director of Education will be obtained before proceeding with external consultations and/or Committee/Board approval.

☒ Director of Education

#### Phase IV. EXTERNAL CONSULTATIONS

Are external consultations applicable to this Policy?

☒ Yes

☐ No (*Ministry of Education mandated policy or corporate policy without external stakeholders*)

Mandatory external consultations will include, at a minimum:

1. Posting of the working draft Policy on TDSB website for public feedback  
(45 days minimum): 245 days-In addition to the 60+ consultation days implemented to develop Policy statements.

2. Extending invitations for consultation to:

☒ Student Senate

and

all Community Advisory Committees of the Board and conducting consultations with the Community Advisory Committees that expressed interest (either individually with each interested committee or collectively with representatives of all interested committees):  
September – December 2021

- ☒ Alternative Schools Community Advisory Committee
- ☒ Black Student Achievement Community Advisory Committee
- ☒ Community Use of Schools Community Advisory Committee
- ☒ Early Years Community Advisory Committee
- ☒ Environmental Sustainability Community Advisory Committee
- ☒ Equity Policy Community Advisory Committee
- ☒ French-as-a-Second-Language Community Advisory Committee
- ☒ Inner City Community Advisory Committee
- ☒ LGBTQ2S Community Advisory Committee (new CAC)
- ☒ Parent Involvement Advisory Committee (PIAC)
- ☒ Special Education Advisory Committee (SEAC)
- ☒ Urban Indigenous Community Advisory Committee (CAC was renamed)

In addition to mandatory consultations, other external participants and projected dates of consultation(s) include:

- ☒ School Councils
- ☒ Professional Associations and Unions
- ☐ Other:

The following methods will be applied in the external consultations:

- ☒ Public meeting
- ☒ Facilitated focus group
- ☒ Call for public delegations
- ☐ Expert panel discussion
- ☒ Survey
- ☒ Posting on the TDSB website
- ☐ Other:

#### **Phase V. COMMITTEE/BOARD APPROVALS**

Following external consultations and revisions, the working draft Policy will be presented to the Governance and Policy Committee on the following date: [April – May 2022](#)

Following recommendation by the Governance and Policy Committee, the revised Policy will be presented to the Board on the following date: [April-May 2022](#)

Once approved, the revised Policy will replace the existing policy on the TDSB website.

#### **Phase VI. IMPLEMENTATION**

Following Board approval, the final revised Policy will be communicated through:

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

Policy implementation will include:

- ☒ Conducting information/training sessions to TDSB staff affected by the Policy

The projected time period for conducting information/training sessions to staff will be: [Fall 2022](#)

- ☒ Review of associated procedures or initiate development of new procedures: [Summer 2022](#)



## **Teacher Hiring: New Policy**

**To:** Governance and Policy Committee

**Date:** 24 March, 2021

**Report No.:** 03-21-4060

### **Strategic Directions**

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

### **Recommendation**

It is recommended that:

- a) the Policy Development Work Plan for the Teacher Hiring Policy, as presented in this report, be approved;
- b) the Teacher Hiring Policy, as presented in this report, be approved;
- c) the review of the Teacher Hiring Policy, including public consultations, be conducted within the first year after the effective date of the Policy, and subsequently, at a minimum every four (4) years.

### **Context**

On October 29, 2020, the Ministry of Education revoked Ontario Regulation 274/12: Hiring Practices. On February 22, 2021, the Ministry of Education issued Policy/Program Memoranda (PPM) 165 – School Board Teacher Hiring Practices (see Appendix A). The PPM165 directs school boards to develop and implement fair, consistent, and transparent teacher hiring policies and processes by March 31, 2021.

To ensure compliance with PPM 165, staff prepared the draft Teacher Hiring Policy (the “Policy”) for the Committee’s consideration (see appendix B).

In order to be able to meet the implementation deadline and as outlined in the attached Policy Development Work Plan (see Appendix C), staff are recommending to use the

streamlined policy development process and waive the public consultations phase in accordance with section 6.26 of the Board's Policy Development and Management governance procedure (PR501):

Consultations are not required for policies mandated by the Ministry of Education (i.e., policies that are developed or revised following formal directions from the Minister of Education or his/her designate), unless the TDSB policy significantly exceeds or deviates from the requirements set out by the Ministry of Education. Notification about the Ministry of Education mandated policies will be provided to all Advisory Committees of the Board and to the public through the Board's website.

Subject to approval of the Policy by the Board of Trustees, staff recommend initiating an immediate review of the Policy, which will include public consultations.

### **Action Plan and Associated Timeline**

**Subject to the Governance and Policy Committee's directions, the Policy will be presented to the Board of Trustees on April 21, 2021 for consideration and final approval.**

Once approved by the Board of Trustees, the new Policy will come into effect immediately, and a review of the Policy will be initiated.

### **Resource Implications**

No additional resources will be required for implementation of the Policy.

### **Communications Considerations**

System-wide communication to staff and stakeholders will be implemented following approval of the Policy. The communication will provide information about the upcoming Policy review.

### **Board Policy and Procedure Reference(s)**

#### Policies:

- Employee Conflict of Interest (P057)
- Employment Equity (P029)
- Equity Policy (P037)

#### Legislative Acts and Regulations:

- Regulation 298: Operation of Schools – General
- Ontario Human Rights Code

## Appendices

- Appendix A: Policy/Program Memoranda (PPM) 165: School Board Teacher Hiring Practices
- Appendix B: Teacher Hiring Policy - Draft
- Appendix C: Policy Development Work Plan

## From

Andrew Gold, Interim Associate Director, Leadership, Learning and School Improvement (Interim), at 416-397-3069 or [andrew.gold@tdsb.on.ca](mailto:andrew.gold@tdsb.on.ca).

Audley Salmon, Interim Executive Superintendent of Employee Services, at 416-397-3726 or [audley.salmon@tdsb.on.ca](mailto:audley.salmon@tdsb.on.ca).

## Policy/Program Memorandum No. 165

**Date of Issue:** February 22, 2021

**Effective:** March 31, 2021

**Subject:** School Board Teacher Hiring Practices

**Application:** Directors of Education

School Authorities

**Reference:** This memorandum is effective following the revocation of Ontario Regulation 274/12, "Hiring Practices".

---

### Purpose

The Ministry of Education is committed to having the best education system in the world in order to prepare students<sup>1</sup> for success, now and in the future. To achieve this, it is critical to have a well-prepared, qualified and diverse teacher workforce with the knowledge, skills, and attributes needed to ensure that all students reach their full potential, regardless of their background or social identity.

The purpose of this memorandum is to provide direction to school boards<sup>2</sup> on the development and implementation of fair, consistent, and transparent teacher hiring policies and processes. The memorandum identifies the components of a teacher hiring policy that school boards are expected to adopt as well as recommended effective practices. The expectations set out in this memorandum apply to hiring processes that begin after the revocation of Ontario Regulation 274/12: Hiring Practices, on October 29, 2020.

This memorandum is informed by leading research on pedagogy and best practices in creating a well-prepared, qualified and diverse workforce in the education sector. It is also informed by the results of consultations with stakeholders who have asked for more fairness and flexibility, mobility, merit and quality in the hiring of teachers.

### Expectations for School Board Hiring Policies

The Ministry of Education expects all hiring decisions to be made in accordance with this memorandum and in accordance with applicable laws, including the *Human Rights Code*, and with school board collective agreements. Hiring decisions must respect the rights of denominational schools and of French-language schools. Where any direction of the PPM conflicts with these other requirements, the applicable laws and collective agreement provisions prevail.

In outlining expectations for teacher hiring, this memorandum upholds the principles mandated in Regulation 298, "Operation of Schools – General", R.R.O., 1990, including those related to teacher qualifications and providing the best possible education program for students.

All school boards in Ontario's publicly funded education system are expected to establish fair, consistent, and transparent policies for teacher hiring. School boards' requirements and selection criteria for hiring should be clearly laid out and publicly available on their websites.



School boards are expected to include the following inter-dependent components in their teacher hiring policies:

- Qualifications and Merit
- Diversity, Equity, and Human Rights
- Employment Mobility
- Fairness and Transparency
- Monitoring and Evaluation

### **Qualifications and Merit**

Teacher hiring policies must adhere to the qualification requirements set out in Regulation 298, “Operation of Schools – General”. School boards should also rely on the following when developing their selection and evaluation criteria:

- valuing applicants' demonstrated experience and commitment to creating a safe, inclusive, equitable, accessible, and high-quality learning environment; providing the best possible program as determined by the principal, and considering applicants demonstrated:
  - teaching commitment;
  - experience or time spent in a particular school; and
  - suitability for a particular assignment.
- valuing applicants' additional experiences, skills, backgrounds, lived and work experience;
- responding to school and board priorities based on clearly defined criteria, including qualifications.

### **Diversity, Equity, and Human Rights**

The promotion of human rights and equity is vital to achieving a diverse and representative teacher workforce to meet the needs of a diverse student body. There is a positive effect on the educational experience and outcomes of historically under-served students when teachers reflect their identities. Research demonstrates that all students benefit from having teachers with varying social identities and lived experiences. The way to achieve a diverse and representative workforce is to:

- ensure that all employment policies and practices are anti-discriminatory;
- work to intentionally identify and remove barriers for Indigenous peoples and equity-seeking groups at each stage of the hiring process. This involves examining each part of the process – from setting job requirements and employment conditions to establishing the recruitment, application, screening, interview, and selection processes so that no stage creates a barrier for candidates.

### **Employment Mobility**

The teacher hiring process should address employment mobility by providing equal opportunity to all OCT certified teachers to apply for any position (occasional, long-term occasional, or permanent) for which they are qualified irrespective of where they are currently employed.

## **Fairness and Transparency**

To support a fair and transparent process for candidates, teacher hiring policies should include:

- a conflict of interest disclosure policy based on the conflict of interest template provided by the Ministry of Education;
- clear steps to avoid nepotism (the attached Teacher Hiring Conflict of Interest Template represents the minimum standard which boards are expected to meet in developing a local policy);
- a process for adherence to the bona fide or “legitimate” job requirements and qualifications through the hiring process, while following the requirements outlined in Regulation 298, “Operation of Schools – General”;
- a process and criteria for all aspects of teacher hiring – setting job requirements, postings, outreach and recruitment, application, screening, interview, and selection processes, including the communication of these;
- a process for tracking and communicating with applicants;
- processes to promote demographically diverse hiring panels that draw on the different experiences, skill sets, and educational and professional backgrounds in the board;
- criteria for evaluating candidates based on more than one source;
- provisions for structured evaluation criteria, questions and tools that prevent interview and selection bias;
- a process for providing constructive interview feedback for candidates, upon request;
- a process for providing accommodation based on needs related to the Human Rights Code; and
- a process for the disclosure of information to the appropriate bargaining units.

## **Monitoring and Evaluation**

Boards should develop a monitoring and evaluation plan to review the effectiveness of their teacher hiring policy and make adjustments as necessary.

## **Effective Practices**

School boards should develop the following effective practices to remove barriers and gaps in teacher hiring. To implement the expectations outlined in this memorandum and to provide that their policies remain relevant, school boards are expected to establish a mechanism, or use existing mechanisms, to collaborate with local teachers' federations and associations.

## **Candidate Selection Practices**

### **Newly Qualified Teachers**

Hiring policies should acknowledge the importance of supporting renewal in the teacher workforce and help to provide career pathways for newly qualified teachers, including those who have been on long-term assignments for a number of years and have not yet secured a permanent position.

The hiring of newly qualified teachers presents:

- an opportunity to introduce new talent and skills to the school system;
- a way to increase diversity; and
- an opportunity to strengthen pathways to the teaching profession and invest in the people who will be the experienced teachers of the future.

### **Representation**

Encouraging diversity of the teaching workforce in the school board is vital because the workforce should be reflective of the diversity in the province. Inequitable representation of historically disadvantaged groups in the workforce can lead to inequities in educational experiences and outcomes for excluded or equity-seeking students.

## **Monitoring and Evaluation Practices to Strengthen Accountability**

### **Data Collection**

The collection of teacher workforce demographic data will provide a foundation for well-informed discussions and decision-making about the vision for a diverse and inclusive workplace, as well as the policies, programs, and procedures that will help to achieve that vision. Quantitative data collection is the first step to helping boards identify employment barriers.

When developing a voluntary workforce census and analysing results, boards should consider the following questions:

- Does the teacher workforce reflect the social identities of the student population and the region as well as the diversity of the province?
- What identities, and intersections of identities, should be represented in the teacher workforce in order to help reflect and meet the needs of the school board community and the diversity of the province?
- Are there some under-represented communities whose members are reluctant to self-identify, which makes it necessary to use alternative or supplement approaches to a census?

School boards are encouraged to explore how they can collect voluntary demographic information from candidates in order to assess whether there is diversity in the candidates that are applying for positions, as well as where there may be barriers to candidates in the teacher hiring process.

### **Employment Systems Review (ESR)**

The collection and analysis of workforce data provides the foundation for an Employment Systems Review (ESR). Each school board should examine its employment systems to determine whether they create barriers for potential candidates or otherwise unfairly impact their chances to succeed. An effective review will also examine the organizational culture for unconscious values, assumptions, and

behavioural norms that can disadvantage groups and individuals based on their personal characteristics.

A centralized applicant tracking and file management system for all hiring-related documentation is recommended as a key monitoring tool. In some boards, such a system may already be in place.

### Creating a Fairness in Employment Plan

The goal at the end of the ESR is to have identified and made recommendations to address the gaps and barriers, including workplace culture and attitudinal barriers, to a diverse and inclusive work environment. Working together, school boards and employee representatives and unions should use the result of the workforce census and ESR to develop a fairness in employment plan that includes goals and timelines for closing those gaps and removing those barriers. This can include specially constructed measures to address the ongoing effects of systemic discrimination.

### Conclusion

The Ministry of Education is committed to having the best education system in the world in order to prepare our students for success, now and in the future. We recognize teachers, and the quality of their teaching, as the single most important factor in the improvement of student achievement.

Fair and transparent school board teacher hiring policies that align with the expectations outlined in this PPM will enable students to have access to teachers who can make a positive difference in their lives. They will be teachers hired based on qualifications, merit and the ability to meet the diverse needs of all students.

The ministry will continue to work with school boards and education partners to provide ongoing support and resources as boards develop and implement local teacher hiring policies and processes aligned with this PPM.

---

<sup>1</sup> In this memorandum, unless otherwise stated, student(s) includes children in Kindergarten and students in Grades 1 to 12.

<sup>2</sup> In this memorandum *school board(s)* and *board(s)* refer to district school boards, school authorities, and Provincial and Demonstration Schools (including the schools operated by the Centre Jules-Léger Consortium).

---

## Appendix

### Teacher Hiring Conflict of Interest Policy

#### 1. Application of this Policy

This Policy applies to all Employees of the School Board involved in teacher hiring.

#### 2. Preamble

This Policy is intended to facilitate Employees' ability to maintain the highest business and ethical standards, and to facilitate the protection of the integrity of Employees in the course of their teacher hiring responsibilities to the School Board.

This Policy defines and addresses potential, apparent and actual conflicts of interest. It provides guidance to Employees so that conflicts of interest are recognized and either avoided or resolved expeditiously through appropriate disclosure and management.

The fundamental principle underlying this Policy is that Employees must not permit relationships with others or external business activities to conflict, or appear to conflict, with the interests of the Board.

#### 3. Definitions

Conflict of Interest means a potential, apparent, or actual conflict where an Employee's financial or other personal interest, whether direct or indirect, conflicts or appears to conflict with the Employee's responsibility to the Board, or with the Employee's participation in any recommendation or decision pertaining to teacher hiring within the Board.

Employee means full-time or part-time Employees of the School Board involved in teacher hiring.

External Activity means any activity of an Employee outside the scope of her/his employment with the School Board undertaken as part of a commercial or volunteer enterprise.

Relationship means any relationship of the Employee to persons of his or her immediate family whether related by blood, adoption, marriage, or common-law relationship, and any relationship of an intimate and/or financial nature during the preceding five years, any student-supervisor relationship, or any other past or present relationship that may give rise to a reasonable apprehension of bias.

Supervisor means the person to whom an Employee reports.

#### 4. Specific Conflicts

Without restricting the generality of this Policy, the following circumstances may give rise to Conflicts of Interest:

i) participating in, or influencing the outcome of the appointment, hiring, promotion, supervision, or evaluation of a person with whom the Employee has, or has had, a Relationship;

ii) acceptance by an Employee of a gift from any of the following persons or entities if a reasonable person might conclude that the gift could influence the employee when performing hiring duties with the School Board:

a) a person, group, or entity that has dealings with the School Board;

b) a person, group, or entity to whom the Employee provides services in the course of his or her duties to the School Board;

c) a person, group, or entity that seeks to do business with the School Board.

An Employee who is offered a gift in the circumstances described in ii) above shall, in writing, notify his or her Supervisor.

## **5. Procedures for Disclosure of Conflicts of Interest**

i) All Employees have an obligation to disclose to their Supervisor or the Director of Education any Conflict of Interest. The Employee must disclose in writing as soon as she/he could reasonably be aware that a Conflict of Interest exists. The existence of a Conflict of Interest does not necessarily preclude involvement in the issue which has given rise to the Conflict ("the Matter"). The Employee must declare, in writing, the nature and extent of the Conflict of Interest no later than any meeting or process in which the Employee participates and at which the Matter is to be considered. The Employee must refrain from taking part in any discussion or decision-making in relation to the Matter, and withdraw from any meeting or process when the Matter is being discussed until a decision has been reached regarding the manner in which the Conflict of Interest will be addressed.

ii) A Conflict of Interest involving an Employee may also be reported to a Supervisor by any other person. A report to a Supervisor about the existence of a potential, apparent or actual conflict of interest shall be made in writing.

## **6. Procedures for Management of Conflicts of Interest**

i) If the Supervisor or Director of Education to whom the disclosure is made also has a Conflict of Interest, the disclosure should be made in writing to the person at the next highest level of authority.

ii) The Supervisor or Director of Education will investigate to determine if a Conflict of Interest exists. Where appropriate, the Supervisor or Director of Education may consult with the Employee and/or others.

iii) If the Supervisor or Director of Education determines there is a Conflict of Interest, the Supervisor or Director of Education should resolve the matter as per [paragraph 7](#) below and shall document, in writing, any remedies that have been applied.

## **7. Options for Resolving Conflicts of Interest**

If a Supervisor or Director of Education determines that a Conflict of Interest exists, the Supervisor or Director of Education will decide a course of action from the following options:

i) If the Matter pertains to [paragraph 4 i\) above](#), and where the Employee may be knowledgeable and have information central to the discussion, the Employee with a Conflict or appearance of Conflict may be permitted to be involved in the Matter without participating in the final decision described in [paragraph 4 i\) above](#).

ii) If an Employee fails to disclose a Conflict as per [paragraph 5](#) above, a range of remedies can be applied, up to and including the termination of employment.

## **8. Contraventions of this Policy**

Adherence to this Policy, in letter and in spirit, is crucial to the relationships of trust that exist between the Board, its Employees, and the public. Contraventions of this Policy, whether arising from dishonesty or inattention, undermine these relationships and may lead to disciplinary action. For Employees, disciplinary sanctions for breach of this policy may take a range of forms appropriate to the nature of the contravention and could include dismissal from employment.

# Toronto District School Board

---

 Policy P0xx

Title: **TEACHER HIRING**

Adopted: TBD

Effectuated: TBD

Revised: N/A

Reviewed: N/A

Authorization: Board of Trustees

---

## 1. RATIONALE

The Teacher Hiring Policy (P0xx) supports implementation of the Ministry of Education's Policy/Program Memorandum (PPM) 165: School Board Teacher Hiring Practices. The Policy is aligned with the TDSB's Equity Policy (P037), Employment Equity Policy (P029), Employee Conflict of Interest Policy (P057) and supports a commitment to fair hiring practices based on qualifications and merit as well as equity and diversity.

## 2. OBJECTIVE

To set out requirements for fair, consistent, and transparent hiring of teachers.

## 3. DEFINITIONS

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

*Lived Experience* refers to a member of a marginalized group. TDSB considers these members to be a valuable asset and encourage applications from candidates with diverse backgrounds, including but not limited to: First Nations, Métis and Inuit peoples, and all other Indigenous peoples; members of groups that commonly experience discrimination due to race, ancestry, colour, religion and/or spiritual beliefs, place of origin, sexual orientations, gender identities, and gender expressions; and persons with visible and/or invisible (physical and/or mental) disabilities.

*Merit*, for the purpose of this Policy, refers but is not limited to: formal qualifications and credentials, professional skills and aptitudes including lived experiences, skillsets, backgrounds and varied work experience that may be considered valuable to the position (e.g. unique perspectives of under-represented groups,

---



such as Indigenous peoples, Black or other racialized people, people with a disability), the ability to speak multiple languages in addition to English or French, working with diverse communities locally or abroad, ability to lead a school band, theatre arts, lead extra-curricular activities, etc., and professional experience outside of the classroom.

OCT is the Ontario College of Teachers.

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

#### **4. RESPONSIBILITY**

The Director of Education holds primary responsibility for the implementation of this Policy. Within the Director’s Office, the responsibility for the coordination and day-to-day management of the Policy is assigned to the Associate Director, Leadership, Learning and School Improvement and the Executive Officer, Employee Services.

#### **5. APPLICATION AND SCOPE**

This Policy applies to all teacher candidates and employees of the Board, including but not limited to Employee Services staff, hiring managers, superintendents, principals and teachers.

#### **6. POLICY**

##### **6.1. General Requirements**

- 6.1.1. Any assignment or appointment of a person to a teaching position will:
  - (a) be in accordance with applicable laws, including the *Ontario Human Rights Code*, PPM 165, and collective agreements; and
  - (b) uphold the principles mandated in Regulation 298 of the Education Act, including those related to teacher qualifications and providing the best possible education program for students.

##### **6.2. Qualifications and Merit**

- 6.2.1. Selection and evaluation criteria for teaching positions will include:
  - (a) demonstrated experience and commitment to creating a safe, inclusive, equitable, accessible, and high-quality learning environment;
  - (b) demonstrated experience or time spent in a particular school;
  - (c) suitability for a particular assignment; and
  - (d) additional experience, skills, backgrounds, lived and work experience.

- 6.2.2. The Board recognizes the importance of supporting newly qualified teachers and is committed to supporting their career pathways.

### **6.3. Diversity, Equity and Human Rights**

- 6.3.1. The TDSB is committed to the promotion of human rights, anti-discrimination and equity to achieve a diverse and representative teacher workforce to meet the needs of a diverse student body.
- 6.3.2. The TDSB will intentionally work to identify and remove barriers for Indigenous peoples and equity-seeking groups at each stage of the hiring process. This involves examining each part of the process – from setting job requirements and employment conditions to establishing the recruitment, application, screening, interview, and selection processes so that no stage creates a barrier for candidates.

### **6.4. Employment Mobility**

- 6.4.1. The Board will provide equal opportunity to all OCT certified teachers to apply for any position (occasional, long-term occasional, or permanent) for which they are qualified irrespective of where they are currently employed.

### **6.5. Fairness and Transparency**

- 6.5.1. To support a fair and transparent process for candidates, the TDSB will:
  - (a) adhere to the Employee Conflict of Interest Policy (P057) to ensure the entire hiring process avoids any conflicts of interest, including nepotism and favoritism;
  - (b) adhere to legitimate job requirements and qualifications, while following the requirements in Regulation 298;
  - (c) uphold a clear process and criteria for all aspects of teacher hiring, including setting job requirements, postings, outreach and recruitment, application, screening, interview, and selection process (and the communication of all aspects);
  - (d) consistently track and communicate with applicants;
  - (e) ensure demographically diverse hiring panels that draw on the different experiences, skill sets, and educational and professional backgrounds in the Board;
  - (f) use more than one source to evaluate candidates and use structured evaluation criteria, questions and tools that prevent interview and selection bias;
  - (g) provide constructive interview feedback for candidates, upon request;

- (h) provide accommodation based on needs related to the Human Rights Code; and
- (i) disclose information to the appropriate bargaining units.

## **6.6. Data Collection and Analysis**

- 6.6.1. The Board will collect and analyze teacher workforce demographic data to support implementation of this Policy.
- 6.6.2. The quantitative data will be used for regular reviews and continuous improvement of employment systems, including for identification and removal of barriers for potential candidates.

## **7. SPECIFIC DIRECTIVES**

The Director of Education is authorized to issue operational procedures to implement this Policy.

## **8. EVALUATION**

This Policy will initially be reviewed within the first year after the effective date, and subsequently, at a minimum every four (4) years.

## **9. APPENDICES**

- NA

## **10. REFERENCE DOCUMENTS**

Legislation:

- Regulation 298: Operation of Schools – General
- *Ontario Human Rights Code*

Policies:

- Employee Conflict of Interest (P057)
- Employment Equity (P029)
- Equity Policy (P037)

Procedures:

- N/A

Other Documents:

- PPM 165: School Board Teacher Hiring Practices

---

**POLICY DEVELOPMENT WORK PLAN**

---

Date: [March 17, 2021](#)

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

**POLICY INFORMATION**

Proposed Policy Title: [Teacher Hiring Policy](#)

Director's Council member responsible for development of the new Policy:  
[Associate Director, Leadership, Learning and School Improvement and Executive Superintendent, Employee Services](#)

**Phase I. APPROVAL OF POLICY RATIONALE**

The rationale for the new Policy: [This Policy is required to comply with the Ministry of Education's Policy/Program Memorandum 165: School Board Teacher Hiring Practices \(PPM 165\). PPM 165 was issued on February 22, 2021 and is effective as of March 31, 2021. PPM 165 replaces Ontario Regulation 274/12: Hiring Practices which was revoked on October 29, 2020.](#)

This Policy Development Work Plan has been discussed with the Policy Coordinator:

- ☒ Yes  
☐ No

**Phase II. OBTAINING TRUSTEES' DIRECTIONS AND DRAFTING POLICY**

This Policy Development Work Plan will be discussed at the Governance and Policy Committee meeting held on: [March 24, 2021](#).

**Creating the Draft Policy**

The draft Policy will be created and aligned with the current Policy Template (see Operational Procedure PR501, Policy Development and Management, Appendix B):

- ☒ Yes  
☐ No

Detailed information on the proposed policy provisions, including findings of the policy equity assessment:

- [See attached draft Teacher Hiring Policy \(Appendix B\)](#)

### Phase III. INTERNAL REVIEWS AND SIGN-OFFS

The draft Policy includes input from TDSB departments affected by the Policy:

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

In addition, the following departments will be required to sign-off on the proposed draft Policy:

- ☒ Legal Services
- ☒ Policy Services
- ☒ Government, Public and Community Relations
- ☒ Director of Education

### Phase IV. EXTERNAL CONSULTATIONS

Are external consultations applicable to this Policy?

- ☐ Yes
- ☒ No (*Ministry of Education mandated policy or corporate policy without external stakeholders*) Ministry of Education mandated policy

Mandatory external consultations will include, at minimum: [N/A](#)

1. Posting of the working draft Policy on the TDSB website for public feedback (45 days minimum) [N/A](#)

2. Extending invitations for consultation to:

☐ Student Senate

and

all Community Advisory Committees of the Board and conducting consultations with the Community Advisory Committees that expressed

interest (either individually with each interested committee or collectively with representatives of all interested committees):

- ☐ Alternative Schools Community Advisory Committee
- ☐ Black Student Achievement Community Advisory Committee
- ☐ Community Use of Schools Community Advisory Committee
- ☐ Early Years Community Advisory Committee
- ☐ Environmental Sustainability Community Advisory Committee
- ☐ Equity Policy Community Advisory Committee
- ☐ French-as-a-Second-Language Community Advisory Committee
- ☐ Inner City Community Advisory Committee
- ☐ LGBTQ2S Community Advisory Committee
- ☐ Parent Involvement Advisory Committee (PIAC)
- ☐ Special Education Advisory Committee (SEAC)
- ☐ Urban Indigenous Community Advisory Committee

In addition to mandatory consultations, other external participants and projected dates of consultation(s) include:

- ☐ School Councils
- ☐ Professional Associations and Unions
- ☐ Other:

The following methods will be applied in the external virtual consultations: Not Applicable

- ☐ Public meeting
- ☐ Facilitated focus group
- ☐ Call for public delegations
- ☐ Expert panel discussion
- ☐ Survey
- ☐ Posting on the TDSB website
- ☐ Other: email correspondence and Virtual Consultations/Webinar

## **Phase V. COMMITTEE/BOARD APPROVALS**

The working draft Policy will be presented to the Governance and Policy Committee on the following date: [March 24, 2021](#).

Following recommendation by the Governance and Policy Committee, the new Policy will be presented to the Board on the following date: [April 21, 2021](#).

Once approved, the new Policy will be added to the TDSB website.

#### Phase VI. IMPLEMENTATION

Following Board approval, the new Policy will be communicated through:

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

Policy implementation will include:

- ☒ Conducting information/training sessions to TDSB staff affected by the Policy

The projected time period for conducting information/training sessions to staff will be: [Summer/Fall 2021](#)

- ☒ Initiate development of new procedures or review of associated procedures  
[An associated Teacher Hiring Procedure will be developed to support implementation of the Policy.](#)

**Blank Page**





## **PR515, Workplace Harassment Prevention and Human Rights Procedure: Revised Procedure**

**To:** Governance and Policy Committee

**Date:** 24 March, 2021

**Report No.:** 03-21-4061

### **Strategic Directions**

- Create a Culture for Student and Staff Well-Being
- Allocate Human and Financial Resources Strategically to Support Student Needs
- Build Strong Relationships and Partnerships Within School Communities to Support Student Learning and Well-Being

### **Recommendation**

It is recommended that the Workplace Harassment Prevention and Human Rights Procedure (PR515), as presented in this report, be received for information..

### **Context**

On December 11, 2020, Executive Council approved revisions to the Workplace Harassment Prevention and Human Rights Procedure (PR515). The Procedure supports the implementation of the Workplace Harassment Prevention Policy (P034) and Human Rights Policy (P031) and fulfills the Board's requirements under the Occupational Health and Safety Act (OHSA) and Ontario Human Rights Code.

The Procedure has been revised to introduce a new Expedited Investigation Process which balances being thorough and fair with being timely, giving life to the requirement to conduct an investigation that is appropriate and fair in the circumstances. The Expedited process respects procedural fairness but is faster and can be employed when deemed appropriate. The previous investigation process, now called the Formal Investigation Process, is retained to be used in appropriate cases.

## **Action Plan and Associated Timeline**

Subject to the Governance and Policy Committee's receipt, the revised Workplace Harassment Prevention and Human Rights Procedure (PR515) will be provided to the Board of Trustees for information.

## **Resource Implications**

No additional resources will be required for implementation of the revised Procedure at this time.

## **Communications Considerations**

The revised Procedure has been posted on the Board's internal/external website and will be communicated to the system, including through the System Leaders' Bulletin.

## **Board Policy and Procedure Reference(s)**

- Workplace Harassment Prevention Policy (P034)
- Human Rights Policy (P031)

## **Appendices**

- Appendix A: Workplace Harassment Prevention and Human Rights Procedure (PR515) – Revised Clean
- Appendix B: Workplace Harassment Prevention and Human Rights Procedure (PR515) – Tracked Changes Version
- Appendix C: Key Features of the Expedited Investigation Process

## **From**

Jim Spyropoulos, Executive Superintendent, Human Rights and Indigenous Education at [jim.spyropoulos@tdsb.on.ca](mailto:jim.spyropoulos@tdsb.on.ca)

Irit Kelman, Acting Senior Manager, Human Rights Office, at [irit.kelman@tdsb.on.ca](mailto:irit.kelman@tdsb.on.ca)

Ros Salvador, Senior Human Rights Policy, Education & Organizational Change Specialist, Human Rights Office, at [ros.salvador@tdsb.on.ca](mailto:ros.salvador@tdsb.on.ca)

**Toronto District School Board**

## Operational Procedure PR515

Title: **WORKPLACE HARASSMENT PREVENTION AND HUMAN RIGHTS**

Adopted: June 29, 2001

Effectuated: June 29, 2001

Revised: October 24, 2017, December 10, 2019, **December 11, 2020**

Reviewed: October 24, 2017, December 10, 2019, **December 11, 2020**

Authorization: Executive Council

**1.0 RATIONALE**

The Toronto District School Board (TDSB or the Board), is committed to providing an equitable, safe, nurturing, positive learning and working environment, free of harassment and discrimination, where every individual is treated with dignity and respect.

This operational procedure is designed to support the implementation of the Workplace Harassment Prevention Policy (P034) and Human Rights Policy (P031) and fulfills the Board's requirements under the *Occupational Health and Safety Act (OHSA)* and Ontario *Human Rights Code* (the *Code*).

**2.0 OBJECTIVE**

To provide information and instruction, regarding the process for how to effectively prevent and, where necessary, address harassment and unlawful discrimination. All parties involved in a matter under these procedures (including staff, management, union/federation/association and Human Rights Office) must work together to prevent and address harassment and unlawful discrimination.

**3.0 DEFINITIONS**

*Allegation* is an unproven claim or assertion that someone has done something wrong based on one's belief that a violation of the Board's Harassment/Discrimination policies has occurred.

*Balance of Probabilities* is the standard of proof which is satisfied where a proposition is reasonable, more probable than not and more probable than any other proposition based on all the evidence.

*Board* is the Toronto District School Board (also referred to as TDSB). The TDSB is an employer, as defined by the OHSA.

*Complainant* is anyone who makes a complaint under the Board's harassment/discrimination policies, alleging that harassment/unlawful discrimination has occurred.

*Discrimination* is any practice or behaviour, whether intentional or not, which has a negative effect on an individual or group because of any of the prohibited grounds of the *Code* including race, ancestry, place of origin, ethnic origin, colour, citizenship, creed (religion), sex, gender identity, gender expression, sexual orientation, age, marital status, family status, disability/perceived disability, or receipt of public assistance (applies to the social area of housing only).

Discrimination may arise as a result of direct differential treatment or it may result from the unequal effect of treating individuals and groups in the same way. If the effect of the behaviour on the individual or group is to withhold or limit full, equal and meaningful access to, for example, goods, services, facilities, employment, housing, accommodation, that is available to other members of society, it is discrimination.

*Employee and Family Assistance Program (EFAP)* is a confidential and voluntary support service that offers assistance to eligible employees of the Board and their families, as set out in the applicable terms and conditions of employment, for any work, life or health concern. This may include immediate and confidential support regarding workplace challenges, addictions, managing relationships/family and achieving well-being.

*Harassment* is a course of vexatious comment or conduct known or ought reasonably to be known to be unwelcome.

*Human Rights Office (HRO)* is an office within the TDSB, that is mandated to be neutral and unbiased and is a resource to all covered under this procedure. The HRO implements the Board's policies and procedure on harassment and discrimination, as well as supports adherence to the associated laws as they relate to harassment and discrimination (e.g., *Ontario Human Rights Code* and *the Occupational Health & Safety Act*).

*Mediation* is a confidential voluntary process that parties to a complaint may agree to participate in, whereby a neutral unbiased third party facilitator is in direct communication between the parties to a complaint, to effect an agreed upon resolution. It is an opportunity to resolve disputes in a mutually respectful manner.

*Reprisal* is any harassment, intimidation, threats, or discipline against a person (e.g., complainant, respondent, witness or investigator) for making a report to the Board regarding an incident/complaint of alleged harassment/discrimination. It can also include retaliation against someone who has participated in or is believed to have participated in a process to address a matter under the Board's harassment and discrimination policies and associated procedure. Reprisal is prohibited under the Board's harassment/discrimination policies and procedure.

*Respondent* is anyone who has a complaint made against them under the Board's harassment/discrimination policies.

*Student* is anyone regardless of age, who is enrolled in any educational program offered by the Board.

*Supervisor* is a person who has charge of a workplace or authority over workers, in accordance with the OHSA.

*Systemic Discrimination* is discrimination that arises from policies, procedures, practices, and conduct which may not be discriminatory in their intent but adversely impact individuals or groups protected by the prohibited grounds of the Code.

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

*Vexatious* is conduct that is inappropriate, unnecessary and that a reasonable person would consider offensive, distressing or demeaning.

*Vexatious Complaints* are complaints that are brought forward without sufficient merit, solely to cause annoyance or distress. Vexatious complaints are prohibited under the Board's harassment/discrimination policies and procedure.

*Workplace* under the OHSA is any land, premises, location or thing at, upon, in or near which a worker works. For the purpose of this procedure it also includes any place where individuals perform work or work-related duties or functions. Schools and school-related activities, such as extra-curricular activities and excursions comprise the workplace, as do Board offices and facilities (including eating, lounge/changing areas and vehicles used for work purposes or on work property). Conferences, workshops, training sessions and staff functions (e.g., staff parties, retirement celebrations), fall within the scope of this procedure.

*Workplace Harassment* under the OHSA is engaging in a course of vexatious comment or conduct against a worker in a workplace that is known or ought reasonably to be known to be unwelcome, or is workplace sexual harassment.

*Workplace Sexual Harassment* is engaging in a course of vexatious comment 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; or making a sexual solicitation or advance where the person making the solicitation or advance is in a position to confer, grant or deny a benefit or advancement to the worker and the person knows or ought reasonably to know that the solicitation or advance is unwelcome.

#### **4.0 RESPONSIBILITY**

Executive Superintendent, Human Rights and Indigenous Education

#### **5.0 APPLICATION AND SCOPE**

This procedure applies to all employees (including contract, temporary, permanent and occasional employees).

It addresses harassment and unlawful discrimination from all sources including volunteers, students, trustees, as well as members of the public.

The Board also has policies/procedures in place to deal with other forms of harassment or offensive conduct. See section 9.0 for a complete list of other relevant policies and procedures.

#### **6.0 PROCEDURES**

##### **6.1. General**

All persons covered under this procedure are responsible for creating, maintaining and contributing to a climate of understanding and mutual respect for the rights and dignity of each person.

Anyone within the scope of these procedures who has a concern regarding potential harassment or discrimination may attempt the following before filing a formal complaint:

- (a) If possible and practical, make it known to the person who is causing the offense, that the behaviour is unwelcome and ask that all offensive behaviour stop.

If approached in the above manner it is expected that the individual will work with the person raising the concern to make all reasonable efforts to resolve the matter. If an individual is not comfortable approaching the person causing offense or an individual is approached and the behaviour

does not stop, discuss the concerns with your immediate supervisor or another member of management;

- (b) Seek advice from a union/federation/association representative (where applicable);
- (c) Contact the Human Rights Office (HRO) to consult, even if there is no intent to file a complaint;
- (d) If eligible, utilize the TDSB Employee and Family Assistance Program (EFAP);
- (e) Do not discuss the complaint or intent to file a complaint with colleagues unless they are your support person (see section 6.3), as this could adversely impact the investigative process, if an investigation is required.

## 6.2. Dual Processes

Nothing in these procedures denies or limits access to other avenues of redress available under the Ontario *Human Rights Code*, *Occupational Health & Safety Act* and/or through filing a grievance.

The TDSB's internal complaint resolution process provides for an investigation appropriate in the circumstances, resulting from an incident/complaint of harassment/discrimination. The HRO, in consultation with the Executive Officer, Employee Services, may decide to postpone, suspend, or cancel any process/investigation regarding a complaint if the continuance of the process/investigation would duplicate or prejudice (damage) another proceeding. In coming to a decision these factors will be considered:

- (a) The Board's responsibility to resolve harassment and discrimination complaints;
- (b) The recognition that grievances may be filed simultaneously with complaints in order to comply with timelines. In such cases one matter may be held in abeyance until the other process is complete, as determined in consultation with Employee Services and with agreement from the union as it pertains to grievances; and/or
- (c) Other legal procedures that may be initiated in order to protect statutory rights, e.g., the Human Rights Tribunal of Ontario (HRTO).

In all such cases the complainant will be advised of the decision to postpone, suspend, or hold in abeyance their complaint and the reasons why.



### 6.3. Support Person for Complainants, Respondents and Witnesses

- (a) Prior to initiating a complaint and throughout the complaints process complainants, respondents and witnesses have a right to assistance from a support person. A support person may include a:
- Colleague
  - Family Member
  - Union/Federation/Association/Network Representative (in accordance with the practices/policies of the respective organization)
  - Joint Health & Safety Committee Representative
  - Parent/Guardian or Other Caregiver
  - School Support Staff
  - Student
  - Teacher
  - Translator/Interpreter
- (b) All persons acting as a support person within the scope of these procedures must keep any information regarding the complaint confidential. Some support persons may be required to sign a confidentiality agreement when attending investigation interviews. (TDSB staff or union/federation/association/network representatives are not required to sign an agreement)
- (c) The role of the support person is to be available to a party to an investigation to provide assurance, console and/or general emotional support or advice. Unions/Associations and Federations may have other responsibilities to their members in this capacity; however, all support persons must not answer questions on behalf of the interviewee or obstruct in any way, the investigation process. The investigator reserves the right to discontinue any investigation interview whereby any party to a complaint or the support person is uncooperative.
- (d) Investigation participants (complainants, respondents and witnesses) and support persons who are staff of the Board, are entitled to be permitted time away from work with pay, providing the appropriate arrangements (including supervisory/management approval), are made with their direct Supervisor or next level management, if the Supervisor is the subject of the complaint. These arrangements should be made by staff and may involve the support of their union/association/federation/network representative, as required.



#### 6.4. Complaint Procedures

##### *Employees*

- Employee incidents/complaints of alleged harassment or discrimination should be made to an immediate supervisor, or the Human Rights Office. Reports can be made verbally; however, it is preferred that the appropriate Workplace Harassment and Human Rights Incident Reporting Form (see Appendix A) is completed. All incidents/complaints of harassment/discrimination whether verbal or in writing must be investigated in a manner deemed appropriate in the circumstances. Employees may also consult with their union/association/federation/network representative when reporting an incident/complaint.
- If the employee complaint is regarding their supervisor or the employer the complaint should be made directly to the Human Rights Office at [HumanRightsOffice@tdsb.on.ca](mailto:HumanRightsOffice@tdsb.on.ca)

##### *Students*

- Student complaints of alleged harassment/discrimination should be reported to the school administration and will be addressed through the appropriate school policy or procedure (e.g., Caring and Safe Schools Policy, Bullying Prevention and Intervention Procedure, Sexual Misconduct by Students Procedure, Parent Concern Protocol).
- Student complaints against the administration should be forwarded to the Board's Human Rights Office. The complaint will be addressed through the appropriate school policy or procedure (e.g., Caring and Safe Schools, Parent Concern Protocol) in cases of systemic concerns, the matter may be referred to an external investigator.

##### *Human Rights Office*

- Incidents/Complaints of harassment/discrimination regarding the Human Rights Office will be forwarded to the Executive Superintendent, Human Rights and Indigenous Education.

##### *Trustees*

- Incidents/complaints against a Trustee, alleging harassment and/or discrimination will be forwarded to the Board's Integrity Commissioner and will be addressed under the Board Member Code of Conduct policy and procedure.

##### *Executives*

- Incidents/Complaints against a Board Executive, alleging harassment and/or discrimination will be forwarded to the Director of Education, who will seek advisement from the Board's General Counsel in engaging the services of a third party external investigator, as deemed appropriate.

*Director of Education*

- Incidents/Complaints against the Director of Education, alleging harassment and/or discrimination will be forwarded to the Chair of the Board, who will seek advisement from the Board's General Counsel in engaging the services of a third party external investigator, as deemed appropriate.

*Members of the public*

- Incidents/Complaints of alleged harassment/discrimination against a member of the public by Board staff will be forwarded to the immediate supervisor of the affected area the Respondent was working or participating in at the time of the alleged incident, or the Board's Human Rights Office.

All staff responsible for receiving complaints of harassment/discrimination under these procedures must ensure they are aware of the appropriate procedures for responding to a complaint (section 6.5 and 6.6 of these procedures). They may also consult with the Board's Human Rights Office regarding appropriate next steps, if required.

## **6.5. Managerial Response to an Incident / Complaint of harassment / discrimination**

- (a) Supervisory /managerial staff may become aware of incidents of harassment or discrimination in the working or learning environment in different ways. They may observe it directly or receive a report from the individual affected. They may even hear about it from a third party. It is important that supervisory and managerial staff pay attention to symptoms of possible harassment or discrimination (e.g., decreased productivity, absenteeism), and intervenes.
- (b) Those experiencing harassment or discrimination may be reluctant or embarrassed to come forward. A timely resolution of an incident/complaint of harassment/discrimination can prevent escalation of a matter and further negative consequences while promoting the restoration of a healthy learning or working environment.
- (c) In all cases, supervisory and managerial staff has a duty to respond to and take action to resolve any alleged or suspected incidents/complaints involving harassment/discrimination.
- (d) The OHSA requires that any incident/complaint of workplace harassment requires an investigation deemed appropriate in the circumstances. For the purposes of this procedure that includes (at a minimum), interviewing the complainant and interviewing the respondent and any relevant witnesses, and making a determination if harassment occurred.

- (e) When an incident/complaint of harassment/discrimination comes to the attention of managerial/supervisory staff they should ensure the well-being of the parties involved, document any pertinent information provided and advise that the matter is taken seriously, will be looked into and supervisory staff will get back to them regarding next steps (generally, within 7 days).
- (f) Generally, supervisory/managerial staff will investigate workplace harassment incidents/complaints. Human Rights Code based harassment or discrimination complaints may be investigated by supervisory/managerial staff depending on the complexity of the matter and nature of the allegations. Supervisory/managerial staff should consult with the HRO in order to make that determination.
- (g) If supervisory/managerial staff conducts an investigation it should be done in accordance with these procedures.

#### **6.6. HRO Response to an Incident / Complaint of Harassment / Discrimination**

- (a) The HRO is neutral and unbiased and is a resource for all covered under this procedure. The HRO will work to prevent workplace harassment and unlawful discrimination as well as respond to inquiries, incidents and complaints.
- (b) The HRO will respond to complaints by conducting preliminary assessments of incidents/complaints of harassment/discrimination, in order to determine if on the face of the complaint the allegation(s) meet the definition of harassment/discrimination and to determine appropriate next steps to deal with an incident/complaint, in a manner deemed appropriate in the circumstances.

This may include re-directing matters to another department of the Board, as deemed appropriate by the HRO. Actions taken or fact-finding conducted for the purposes of an assessment will be deemed an investigation appropriate in the circumstances for purposes of the OHSA, if the assessment determines that on the face of the complaint no further investigation of the matter is warranted.

- (c) If it is determined that on the face of the complaint it rises to the definition of harassment/discrimination, the HRO will retain carriage of the complaint and assign it to an investigator (HRO investigator, appropriate Supervisory or Managerial staff, or in some cases an external third party investigator). Generally, Workplace Harassment investigations will be completed by Supervisory or Managerial staff, as well as some Human Rights complaints, depending on complexity. Generally, the HRO will

investigate Human Rights complaints that are more complex and potentially Workplace Harassment complaints that are more complex, depending on the circumstances. External Third Party investigators may be used for various reasons, including but not limited to the complexity or size of a complaint/investigation; availability of internal resources etc.

In certain circumstances, the HRO may determine that the matter is more appropriately investigated by an investigation team, in which case a lead investigator will be assigned.

- (d) If on the face of the complaint the allegations do not meet the definition of harassment/discrimination, the HRO may forward the complaint to another area of the Board to address (e.g., appropriate supervisory/managerial staff, employee services in cases involving alleged culpable behaviour, Health & Safety in matters relating to workplace violence), or the HRO may recommend Mediation in cases involving workplace conflict or as deemed appropriate in the circumstances. In such cases, supervisory staff in conjunction with the union/association/federation/network representative and the affected employee(s) should give consideration to whether a third party mediator (agreeable to all parties), is appropriate.

In some cases, the HRO may determine that no further action is required.

- (e) Where it is determined by the HRO that the matter is more appropriately dealt with by another department of the Board, the complainant will be notified prior to forwarding the complaint. In such cases, the alleged Respondent is typically not notified by the HRO.
- (f) The HRO may also determine that the matter complained of has already been dealt with through another forum (i.e., grievance/arbitration, employee services disciplinary process). In such cases, the complainant will be advised of this by the HRO prior to file closure.
- (g) The HRO has discretion to limit the allegations in any complaint due to duplication of information or in order to streamline the complaint, without loss of any substantive information.
- (h) Anonymous complaints against an individual or group will be treated in a manner deemed appropriate in the circumstances by the HRO, including exploring other alternatives to address the matter, including, but not limited to, the use of workplace environmental scans, generalized training for staff, or feedback provided to the individual/group. This will be done in consultation with Employee Services and/or Management of the affected area. No formal summary in writing will be provided to any party to an anonymous complaint.

- (i) Group Complaints are very challenging situations for all involved. The HRO recommends that those who have concerns under these procedures should submit their concerns separately. Approaching someone to participate in a group complaint, whereby an issue had not been identified by them previously can potentially create other issues in the workplace that may not have otherwise been present. This is in no way to limit any staff from coming forward with concerns. In situations involving multiple parties to a complaint, employees are encouraged to confidentially speak with their respective union/association/federation/network representative or contact the HRO and encourage others with concerns to individually do the same.

## **6.7. Investigations – Preliminary Considerations**

### **(a) Responsibility**

- (i) Supervisory/Managerial staff investigating a matter under this procedure, has responsibility for ensuring they are following this procedure and are appropriately trained to investigate the matter. If in doubt, please contact the HRO for advice.
- (ii) All persons investigating matters under this procedure, including external investigators, will have regard for these procedures. Slight variations in process may be acceptable, as deemed appropriate by the HRO.
- (iii) The person conducting the investigation, whether internal or external to the workplace, must not be directly involved in the alleged incident(s) or complaint(s) of harassment/discrimination, and must not be under the direct control of the alleged harasser, in accordance with the OHSA.

### **(b) Confidentiality**

Any person reporting an incident or complaint of harassment /discrimination or who participates in a process to resolve a matter under this procedure (including investigators), must keep that information confidential and not disclose or release to anyone any information about the incident/complaint except to the extent necessary to protect an employee (s) (e.g., safety plan or separation of parties through the Administration/Board Health & Safety office), to investigate the incident/complaint (e.g., make arrangements for release time, questioning witnesses etc.), to take corrective action (e.g., consultation with employee services regarding appropriate action based on investigation findings), or as otherwise required by law (e.g., Tribunal or other court proceedings), in accordance with the OHSA. This extends to details of a complaint

(including its existence), meetings about an incident/complaint, identifying information about a person including names of witnesses, contact made with an investigator etc. This is a continuous obligation that extends beyond employment with the TDSB.

Seeking advice from an employee's own union/association/federation/network or legal representative in addressing harassment/discrimination is permitted, and may be required by some Collective Agreements and/or Terms and Conditions of Employment. While staff may seek advisement from their own legal representative, at their own cost, the HRO only recognizes an employee's union/association/federation/ representatives as the employee's legal representative. The HRO will not communicate directly, with a staff's lawyer.

Note: The HRO may be required to advise other areas of the Board with regards to the existence of a complaint in order to avoid a duplication of processes. In such cases, only the minimum information required will be provided, as determined by the HRO. For example, upon receipt of a harassment or discrimination grievance Employee Services may inquire with the HRO, as to the existence of a complaint in the HRO regarding the matter and the status of the complaint.

Notwithstanding the above, additional information may be required for legal proceedings with the appropriate formalized request to the HRO (e.g., letter requesting production of documents, HRTD Application response required etc.). HRTD proceedings require disclosure of the complaint and the resolution, if any. The HRO will not provide any complete file to any area of the Board unless required by law.

(c) Time Limit

Complaints made under these procedures must be made within one year of the date of the alleged incident(s) or the last incident of harassment/discrimination in a series of incidents. Permission to proceed with a complaint outside of this timeline may be obtained in consultation with the Human Rights Office. The HRO must be satisfied that the delay was incurred in good faith and no substantial prejudice or unfairness will result to any person affected by the delay. Complaints regarding sexual harassment/assault will also be assessed on a case by case basis.

(d) Safety and Separation of parties (Interim Measures)

All investigators will explore with parties whether there are any immediate concerns for physical safety or whether separation of parties needs to be arranged as an interim measure during the course of the investigation.



Any decision around separation of parties will be made with the supervisory or next level up managerial staff in consultation with Employee Services. The appropriate union/federation/association/network will be contacted as deemed appropriate. Supervisory staff/Employee Services may also consult the HRO regarding the general nature of the complaint/allegations to assist in their decision-making.

Considerations will include, but are not limited to the following:

- Whether the continued presence of the respondent will impair the complainant's ability to function at school or work
- Whether the Respondent poses a risk to the complainant or others
- Whether there has been a reprisal or a real threat of reprisal exists

Where supervisory staff determines, (in consultation with Employee Services), that separation of parties is appropriate and required the parties shall be separated, pending the final disposition of the complaint. Separation of parties may include:

- Working in the same physical location with strict parameters around having no contact with each other (this must be put in writing)
- Temporarily relocating one party to the complaint, by moving to an alternate location (generally, the respondent will be the party moved; however, given certain circumstances it may be appropriate for the complainant to be moved, as determined by supervisory staff and Employee Services. (Consideration should also be given to the complainant's preference.)
- In rare occasions, a party may be placed on home assignment without loss of wages or benefits. Students may be excluded from their school(s) in accordance with Board procedure governing student behaviour, and the *Education Act*.
- To the extent practicable, complainants and respondents using Board premises or premises where Board programs take place shall be required to have no contact either direct or indirect with each other until the investigation has been concluded and recommendations acted upon.
- Parties to a complaint who have been moved or on home assignment as per above, may be moved back or resume their previous position as soon as Supervisory staff/ Management determines (in consultation with the complainant and respondent and Employee Services), that separation is no longer necessary.
- A separation of parties pursuant to these procedures does not constitute "discipline" or a "transfer" within the meaning of any Collective Agreement or Terms and Conditions of Employment and is not considered to be Reprisal in the meaning of this procedure.

(e) Medical/Other leaves during an investigation

If a complainant or respondent is on medical/other leave at any point during the complaints process (including during an investigation), it is incumbent upon them or their representative (if applicable) to advise the investigator and indicate whether the party is able to participate in the complaint/investigative process while on leave.

For medical leaves, if the party is still able to participate in the complaint/investigative process they must provide the Human Rights Office or appropriate supervisory/managerial staff with medical documentation advising the employee is medically fit to participate in the complaint/investigative process while on leave.

If the party to the complaint is not able to participate or otherwise advise the investigator of the leave, the matter may be held in abeyance or the process may be otherwise delayed, as determined by the investigator, until the return from leave.

Any medical documentation forwarded to the HRO will be kept securely in a locked file cabinet.

(f) Addressing incidents/complaints of harassment/discrimination in the absence of a formal written complaint:

It may come to the Board's attention that there is alleged harassment/discrimination where the alleged victim(s) do not wish to/have not come forward. Or, a complainant may determine that they do not wish to proceed with a complaint or may withdraw a complaint. In those circumstances, the Board may request a reason for withdrawing a complaint or may determine an investigation deemed appropriate in the circumstances is required in the absence of a formal written complaint, or may initiate an investigation with the intent of determining if harassment/discrimination is occurring and stopping it, in order to fulfil the Board's legislated requirement in providing a workplace free of harassment/discrimination.

## **6.8. Investigation Processes**

Either the Expedited or the Formal investigation process may be used to investigate incidents/complaints as is appropriate in the circumstances as determined by the HRO if the HRO has carriage of the matter, or as determined by the supervisory/managerial staff conducting the investigation if the HRO does not have carriage the matter. Factors to consider in determining which process is appropriate in the circumstances include the size, complexity, and the nature and extent of the potential impact of the



investigation. The Expedited Investigation Process may be used to investigate incidents that occurred or complaints that were made prior to the amendments to this procedure introducing the Expedited Investigation Process.

#### *6.8.1. Formal Investigation Process*

The following procedures will be followed when the investigator/HRO elects, in accordance with section 6.8, to use the Formal Investigation Process.

##### (a) Written notification of complaint

All parties to a complaint will be notified in writing, as soon as practical and prior to an investigation interview, as to the existence of the complaint, the allegations, who filed the complaint and who it was filed against (if multiple persons, each person will be advised individually without advising of the other parties named in the complaint).

If an incident/complaint of harassment/discrimination is reported to managerial/supervisory staff or the HRO, in the absence of a formal written complaint, the Board is still required to investigate, in which case a general statement of the allegations or some other form of written notification may be provided to parties (complainant/Respondent).

All written notification to parties (complainants, respondents and witnesses) by the investigator, should include cautions regarding maintaining confidentiality and not engaging in reprisal/threats of reprisal. The notification should include copies of the Board's Human Rights and Workplace Harassment Prevention Policies and procedure, regardless to the type of complaint being investigated (workplace harassment, human rights etc.)

##### (b) Timelines

- (i) Incidents/complaints brought to the attention of Supervisory staff or the HRO will be acknowledged in writing within seven (7) business days of receipt or knowledge of the incident/complaint.
- (ii) The complainant will be advised by supervisory staff or the HRO of the next steps regarding their complaint within ten (10) business days of acknowledging the incident/complaint.
- (iii) Generally, matters assigned for investigation will be investigated within 90 (and up to 150) days of being assigned, depending on the availability of parties to the complaint, complexity of the matter – number of parties, nature of allegations, time of year the complaint is

received (e.g., summer for school-based complaints) etc. Any delays in timelines will be communicated to complainants and respondents including the reasons for the delay.

- (iv) While the process may begin for complaints received in May/June or throughout the summer for school-based complaints, ultimately the complaint may be held in abeyance until the following September due to the lack of availability of school based staff, representatives etc. during that time. In such cases, the HRO/Supervisory staff will advise the parties as soon as practical.
- (v) If an investigation is initiated, the investigator will prepare a written draft summary of the findings of the investigation and forward to the complainant and respondent (if multiple parties, each will receive individual summaries). Parties will have seven (7) business days to respond.
- (vi) The investigator will take any responses to the draft summary into consideration and issue a final summary to the parties within seven (7) business days of the draft response due date.
- (vii) Final summaries will also be forwarded to the next level manager for the complainant and respondent at the time the final summary is provided to them, along with any recommendations to follow-up with Employee Services if findings are made or other specific follow-up is otherwise required.
- (viii) Supervisory staff, the HRO and any investigator conducting an investigation under the Formal Investigation Process, will have regard for these timelines. From time to time there may be delays; however, it is incumbent upon the responsible party (supervisory staff, HRO or other investigator) to advise the parties of the delay and any reasons why.

(c) Investigation Fact-finding Process

- (i) Parties to a complaint should be invited to an investigation interview within a reasonable time, if possible. They should be advised that they may bring a representative/support person. Complainants should be advised that they should check to see if their association/federation/network offers representation for complainants, as some do not. Conversely, as a Respondent some Collective Agreements require that a Respondent must have representation.

Investigators should confirm with the interviewee in advance of the interview, who their support person will be (if any), to ensure there is no conflict of interest with their choice. It is up to the investigator to determine if there is a conflict of interest with the choice of support person/representative.

- (ii) Generally, in most circumstances it is appropriate to interview the complainant first, followed by the respondent. Parties should be asked for witnesses who may have relevant information and any relevant witnesses should then be interviewed (separately), as determined by the investigator.
- (iii) Investigators should prepare questions in advance of the interview and take detailed notes in the interview and allow the interviewee to review the notes and sign/initial to confirm accuracy.
- (iv) The investigator is responsible for determining the appropriateness of the questions being asked. Information outside of the initial written notification of the complaint may come to the attention of the investigator during the course of the investigation, or the investigator may learn new information from witnesses. Relevant parties to the complaint are entitled to know of this new information and have a full opportunity to respond.
- (v) All interview notes maintained by the investigator are the property of TDSB. External investigators must provide their notes and documentation to the HRO upon conclusion of the investigation (unless legally privileged).
- (vi) An investigator conducting an investigation under this procedure has authority to access documents or materials (i.e., video footage) relevant to the complaint. This does not include legally privileged documents or documents otherwise protected (e.g., information regarding juvenile criminal records).
- (vii) The investigator will consider all of the evidence gathered and determine whether or not an incident(s) of alleged harassment/discrimination took place and whether it amounts to a breach of the human rights or workplace harassment prevention policy, using the standard of proof called the “balance of probabilities.”
- (viii) Potential investigation outcomes are as follows:
  - An investigation may determine that, on a balance of probabilities, an alleged incident (s) took place; however,

upon investigation did not amount to harassment/discrimination;

- An investigation may determine that, on a balance of probabilities, an incident(s) took place and amounts to harassment/discrimination;
- An investigation may determine that, on a balance of probabilities, there is insufficient evidence to conclude whether an incident(s) took place, and consequently whether or not harassment/discrimination occurred;
- An investigation may determine that, on a balance of probabilities, the incident(s) did not take place and there is no finding of harassment/discrimination;
- An investigation may determine that the complaint is vexatious/frivolous.

(d) Communicating the Results of the Investigation

- (i) The investigator will prepare a written summary of the matter and send to the complainant and respondent respectively. If the parties are represented by a union/association/federation/network a copy of the summary should be provided to them as well. A PDF document watermarked “draft” is recommended and the complainant (s)/ respondent (s) will have 7 business days to respond to the draft summary. If the HRO has carriage of the matter, the investigator will send the draft written summary to the HRO prior to sending it to the parties/representatives.
- (ii) The investigator will consider any responses to the draft summaries and determine if edits to the summary are warranted or further investigation required in order to close any perceived gaps. The summaries will then be finalized and sent to the respective parties and their representatives (if represented by a union/association/federation/network). Only one (1) draft written summary will be issued and one (1) final written summary (watermark removed). The final summary will indicate who will follow-up with the respective parties regarding the actions taken/to be taken as a result of the investigation findings.
- (iii) Final written summaries or a report of an investigation will be sent to the next level manager of the parties or supervisory staff responsible for determining/implementing any actions required, and to the HRO if the HRO has carriage of the matter.

### 6.8.2 *Expedited Investigation Process*

A key objective of the Expedited Investigation Process is to provide for a more timely resolution of incidents and complaints of discrimination and harassment than may be afforded under the Formal Investigation Process. The following procedures will be followed when the investigator/HRO elects, in accordance with section 6.8, to use the Expedited Investigation Process. The investigator may adopt aspects of the Formal Investigation Process as is appropriate in the circumstances in the investigator's discretion.

#### (a) Notifications

- (i) The complainant will be advised by supervisory staff or the HRO of the next steps regarding their complaint within ten (10) business days of receipt or knowledge of the incident/complaint.
- (ii) All parties to a complaint will be notified, as soon as practical and prior to an investigation interview, as to the existence of the complaint, the allegations, who filed the complaint and who it was filed against (if multiple persons, each person will be advised individually without advising of the other parties named in the complaint).

A respondent is entitled to know and have the opportunity to respond to all allegations against them that are under investigation.

If an incident/complaint of harassment/discrimination is reported to managerial/supervisory staff or the HRO, in the absence of a formal written complaint, the Board is still required to investigate, in which case a general statement of the allegations may be presented to the parties (complainant/respondent).

The investigator should caution parties (complainants, respondents, and witnesses) regarding maintaining confidentiality and not engaging in reprisal/threats of reprisal, and refer them to the Board's Human Rights and Workplace Harassment Prevention Policies and procedure, regardless to the type of complaint being investigated (workplace harassment, human rights etc.)

#### (b) Timelines

- (i) Generally, matters assigned for investigation will be investigated within 90 days of being assigned, except in extenuating circumstances. Any delays in timelines will be communicated to complainants and respondents including the reasons for the delay.

- (ii) While the process may begin for complaints received in May/June or throughout the summer for school-based complaints, ultimately the complaint may be held in abeyance until the following September due to the lack of availability of school based staff, representatives etc. during that time. In such cases, the HRO/Supervisory staff will advise the parties as soon as practical.
- (iii) Supervisory staff, the HRO and any investigator conducting an investigation under the Expedited Investigation Process will have regard for these timelines. From time to time there may be delays; however, it is incumbent upon the responsible party (supervisory staff, HRO or other investigator) to advise the parties of the delay and any reasons why.

(c) Investigation Fact-finding Process

- (i) Parties to a complaint should be invited to an investigation interview within a reasonable time, if possible. They should be advised that they may bring a representative/support person. Complainants should be advised that they should check to see if their association/federation/network offers representation for complainants, as some do not. Conversely, as a Respondent some Collective Agreements require that a Respondent must have representation.

Investigators should confirm with the interviewee in advance of the interview, who their support person will be (if any), to ensure there is no conflict of interest with their choice. It is up to the investigator to determine if there is a conflict of interest with the choice of support person/representative.

- (ii) Generally, in most circumstances it is appropriate to interview the complainant first, followed by the respondent. Parties should be asked for witnesses who may have relevant information and any relevant witnesses should be interviewed (separately), as determined by the investigator.
- (iii) Investigators should take and retain detailed notes in each interview.
- (iv) The investigator is responsible for determining the appropriateness of the questions being asked. Information outside of the initial notification of the complaint may come to the attention of the investigator during the course of the investigation, or the investigator may learn new information from witnesses. Relevant parties to the complaint are entitled to know of this new information and have a full opportunity to respond.

- (v) All interview notes maintained by the investigator are the property of TDSB. External investigators must provide their notes and documentation to the HRO upon conclusion of the investigation (unless legally privileged).
- (vi) An investigator conducting an investigation under this procedure has authority to access documents or materials (i.e., video footage) relevant to the complaint. This does not include legally privileged documents or documents otherwise protected (e.g., information regarding juvenile criminal records).
- (vii) The investigator will consider all of the evidence gathered and determine whether or not an incident(s) of alleged harassment/discrimination took place and whether it amounts to a breach of the human rights or workplace harassment prevention policy, using the standard of proof called the “balance of probabilities.”
- (viii) Potential investigation outcomes are as follows:
  - An investigation may determine that, on a balance of probabilities, an alleged incident (s) took place; however, upon investigation did not amount to harassment/discrimination;
  - An investigation may determine that, on a balance of probabilities, an incident(s) took place and amounts to harassment/discrimination;
  - An investigation may determine that, on a balance of probabilities, there is insufficient evidence to conclude whether an incident(s) took place, and consequently whether or not harassment/discrimination occurred;
  - An investigation may determine that, on a balance of probabilities, the incident(s) did not take place and there is no finding of harassment/discrimination;
  - An investigation may determine that the complaint is vexatious/frivolous.
- (ix) The investigator must create and retain a document that sets out the investigator's findings of fact in relation to the allegations that were investigated, any conclusions reached, and reasons for those conclusions. If the HRO has carriage of the matter, the investigator will send this document to the HRO prior to communicating the results of the investigation to the parties.



(d) Communicating the Results of the Investigation

- (i) The complainant and respondent must be informed of the following in writing (the “Expedited Investigation Findings Letter”):
  - The results of the investigation.
  - Who will follow-up with the respective parties regarding the actions taken/to be taken as a result of the investigation findings.
- (ii) A summary of the reasons for the investigator’s conclusions, including an explanation as to why the conduct in issue breaches/does not breach the policy, must be provided to the complainant and respondent, either orally or in writing, at the same time or within two (2) business days of the Expedited Investigation Findings Letter.
- (iii) The Expedited Investigation Findings Letter will be forwarded to the next level manager for the complainant and respondent or supervisory staff responsible for determining/implementing any actions required, and to the HRO if the HRO has carriage of the matter, along with any recommendations for the supervisor/manager to follow-up with Employee Services if findings are made or other specific follow-up is otherwise required.

## 6.9. Following the Investigation

(a) Determination of Disciplinary/Remedial Action

Upon receipt of a written summary or report of findings of an investigation (Formal Investigation Process) or an Expedited Investigation Findings Letter, supervisory/managerial staff must make a determination (in consultation with Employee Services), as to whether any disciplinary or remedial action is required.

Having regard for the Board’s commitment to Equity and Inclusion, **to the extent possible**, any disciplinary or remedial action taken with a student/employee as a result of the findings of an investigation under these procedures, should be done with an equity lens, utilizing the TDSB Equity Framework.

(b) Notification of Action to be Taken

In accordance with the OHSA, any actions that will be taken as a result of the findings of the investigation must be communicated to the complainant and respondent in writing. This should be done within ten (10) business days of the responsible supervisor/manager receiving the investigation



summary letter (Formal Investigation Process) or the Expedited Investigation Findings Letter. Information shared with complainants regarding actions taken with a respondent should not specify the exact discipline; however, should note if formal corrective action has been or will be taken, as well as measures put in place to prevent the matter from taking place again.

(c) Investigation Action Plans

- (i) Any action (disciplinary or remedial etc.) that will be taken by supervisory/managerial staff as a result of the findings of an investigation where the HRO had carriage of the matter, must be outlined (in consultation with Employee Services) by the supervisor/manager on the Action Plan Template sent by the HRO, signed, and sent back to the HRO within ten (10) business days of the supervisor/manager receiving the final investigation summary letter or Expedited Investigation Findings Letter.
- (ii) The HRO will monitor the Action Plans to ensure the agreed upon action is taken.

#### **6.10. Request for Review of A Final Investigation**

A complainant or respondent may request to the Executive Superintendent, Human Rights and Indigenous Education, that a Review of the Investigation be undertaken. The intent to submit a formal "Request for Review" must be made to the Human Rights Office in writing within seven (7) business days of the issuance of the final written summary of investigation findings (Formal Investigation Process) or the Expedited Investigation Findings Letter. The actual document to be submitted for consideration of a review, outlining the ground(s) for the review (see below), and all relevant details must be submitted to the Human Rights Office within 15 business days of notifying the HRO of the intent to request a review.

The grounds for review are:

- The investigators did not comply with these procedures
- New evidence has become known to the complainant or respondent after the final decision but before the expiry of the seven (7) days limitation period for requesting a review.

No review of the final decision will be undertaken with regard to the claim that the conclusions drawn by the investigator(s) based on findings of fact were incorrect.

The Executive Superintendent, Human Rights and Indigenous Education shall convene a reviewer(s) and the reviewer will report its findings to the Executive

Superintendent, Human Rights and Indigenous Education who will affirm or amend a final decision or require that a new investigation be undertaken. The decision of the Executive Superintendent, Human Rights and Indigenous Education is final.

A response from the Executive Superintendent, Human Rights and Indigenous Education regarding the Request for Review, shall be forwarded to the requester within 30 days of convening a reviewer.

Wherever possible and appropriate, where a party to a complaint is facing disciplinary action as a result of investigation findings and has requested a review of the investigation, the disciplinary action shall be postponed until the outcome of the review.

## **6.11. Potential Disciplinary and Remedial Action**

### **(a) Potential Disciplinary Action**

#### *Student Respondents*

The Principal will follow the appropriate procedures for addressing student misconduct, as outlined in the Education Act and other specific Board policies and procedures.

#### *Employee Respondents*

The appropriate supervisory/managerial staff shall impose formal discipline (in consultation with Employee Services), as deemed appropriate based on the findings of the investigation (e.g., written warning, suspension, up to and including termination of employment with the Board).

In all cases where a complaint is substantiated and a determination is made to proceed with formal discipline, the appropriate supervisory/managerial staff shall ensure that a record (i.e., letter) of the disciplinary action is placed in the employee respondent's official personnel file. The supervisor/manager should keep their written notes of any non-disciplinary responses locked in their own files. Coaching letters or letters of counsel are not deemed formal discipline and are not included in an employee's personnel file.

**No other information or documentation regarding a harassment/discrimination complaint (other than disciplinary action), should be included in an employee's official personnel file.**

*Members of the Public Respondents*

Dependent upon the circumstances, parents, contractors etc. may be issued letters of disapproval/warning, revoking of permits/contracts, or an issuing of a no trespass warning.

(b) Potential Remedial Action

- Education or Training
- Counselling for the parties
- Customized workshops for staff/students
- Application of strategies to restore a positive working/learning environment
- Mediation
- Permanent separation of parties

(c) Actions related to Systemic Discrimination

Where systemic discrimination is found or suspected, proactive steps will be taken to ameliorate such conditions by:

- Conducting employment systems reviews
- Departmental re-organization
- Applying Employment Equity goals and timetables in specific areas
- Replacing learning/working materials
- In-service training for appropriate staff
- Reconsidering the assessment and placement procedures for students

**6.12. Informal Resolutions**(a) General Principles

Informal Resolutions are an important element in addressing alleged harassment/discrimination. Informal resolution is a potential alternative only after an initial fact-finding investigation, (at minimum speak to complainant and speak to respondent), has taken place and the investigator determines informal resolution is appropriate in the circumstances (in accordance with the OHSA).

Any form of informal resolution (e.g., apology, mediation) should be agreed to and signed off on by the parties to the complaint (complainant (s), respondent(s)).

In certain circumstances parties to a complaint or their representatives may request an informal resolution; however, that decision remains with supervisory/managerial staff or the Board's Human Rights Office, bearing

in mind that all parties are expected to work together to prevent and address matters under these procedures.

(b) Member to Member Concerns

In cases where members of the same union/association/federation/network are involved in a matter related to these procedures, the respective union/association/federation/network may wish to work with the parties involved to resolve the matter prior to it becoming a formal complaint. Those efforts are encouraged; however, if they are not successful or the matter is deemed to be too complex, the respective union, association, federation, network representative may wish to counsel/assist the member in bringing the report forward to their Principal, manager, supervisor or the HRO. It is understood that in some cases this may not be possible due to legal or internal policy/procedural requirements of the respective union, association, federation or network.

(c) Mediation

Mediation involves an unbiased third party acting as a facilitator to resolve disputes. Mediation is typically more appropriate when a matter is deemed to be workplace conflict. In cases where an investigation has commenced in regards to harassment/discrimination, mediation may be attempted during the course of the investigation only after an initial fact-finding process takes place (in accordance with the OHSA), and the investigator determines it is an appropriate form of resolution. All mediation and mediated resolutions should involve the parties respective union/association/federation/network representative and must be provided to parties to a complaint in writing and signed off by the parties. The mediator should be mutually agreeable to both parties.

If mediation is attempted during the course of an investigation and is unsuccessful, the investigation will resume and the parties will be advised by supervisory/managerial staff or the mediator, that information obtained during mediation, or any attempted settlement arising from mediation cannot be introduced as evidence in any subsequent formal proceeding.

Mediation may not appropriate in the following circumstances; however, may be evaluated on a case by case basis:

- All parties are not committed to the process;
- One of the parties is in a position to confer, grant or deny a benefit;
- Students involved in disputes with employees or members of the public, including parents and community covered by this procedure.

The HRO may be consulted when considering a trained mediator, acceptable to both parties. In no circumstance shall a mediator be used who is involved in any capacity in the same learning or working environment/site as the parties with the exception of student peer mediators.

Student-led mediation using trained “peer mediators” may be used to facilitate an informal resolution between students, if acceptable to the parties. Principals shall ensure that any terms agreed to are met.

In all cases of mediated or informal resolution, supervisory/managerial staff is responsible for monitoring the situation to ensure the effectiveness of the resolution.

### **6.13. Records**

All correspondence and other documents generated under these procedures and related policies must, subject to the Municipal Freedom and Information and Protection of Privacy Act, be marked, “PRIVATE AND CONFIDENTIAL” and must be stored in a locked and secure file in the office of management/supervisory staff or in a locked and secure file cabinet in the Human Rights Office. This includes, but is not limited to, copies of the complaint, details regarding the incident/complaint, investigation notes, statements, summaries or reports, and Expedited Investigation Findings Letters.

No information regarding incidents/complaints of alleged harassment/discrimination shall be placed in an employee’s personnel file unless they have been found to have breached the harassment/discrimination policies/procedure and discipline is issued. The discipline will be the only documentation that remains on the employee’s file for the duration applicable as per the relevant Collective Agreement or Terms and Conditions of Employment.

These records shall be kept for a period of 15 years from file closure, and if at that time there is no litigation, investigation or further activity under these procedures or other related policies involving a party to the original complaint, all records of the complaint (paper and electronic will be shredded or erased). A record of the type of document destroyed, by whom and when should be kept in accordance with Privacy legislation.

Please note that it is unlawful for an employer to destroy any evidence or potential evidence that may be required in a matter that is currently, or that you may be aware may result in litigation. Contact TDSB legal services or the HRO, if in doubt.

Statistics may be derived from information collected under these procedures and related policies; however, in all cases it will be presented in aggregate form without the use of names or other personal identifiable information.

## 7.0 EVALUATION

In order to ensure the effectiveness of these procedures they will be reviewed as required, and at least annually, in accordance with the *OHSA*.

## 8.0 APPENDICES

Appendix A: Workplace Harassment and Human Rights Incident Reporting Form (Form 515A)

## 9.0 REFERENCE DOCUMENTS

### Policies:

- Acceptable Use of Information Technology Resources (P088)
- Board Member Code of Conduct (P075)
- Caring and Safe Schools (P051)
- Gender-Based Violence (P071)
- Human Rights (P031)
- Occupational Health and Safety (P048)
- Reporting of Suspected Wrongdoing (Whistleblowing) (P066)
- Respectful Learning and Working Environment (P073)
- Workplace Violence Prevention (P072)

### Operational Procedures:

- Board Code of Conduct (PR585)
- Bullying Prevention and Intervention (PR703)
- Code of On-line Conduct (PR571)
- Complaint Protocol for the Board Member Code of Conduct (PR708)
- E-mail Usage (PR572)
- Parent Concern Protocol (PR505)
- Promoting a Positive School Climate (PR697)
- Sexual Misconduct by Students (PR608)

### Legislative Acts and Regulations:

- *Education Act*
- *Municipal Freedom of Information and Protection of Privacy Act*
- *Occupational Health and Safety Act*
- *Ontario Human Rights Code*



PRIVATE &amp; CONFIDENTIAL

**Appendix A**  
**APPENDIX A**  
**Form 515A**  
December 2020**Workplace Harassment and Human Rights  
INCIDENT REPORTING FORM****NAME OF COMPLAINANT:**

First name: \_\_\_\_\_ Last name: \_\_\_\_\_ Employee# \_\_\_\_\_

School/Department/Worksite: \_\_\_\_\_ Home/Cell Phone No: \_\_\_\_\_

Status of complainant: ☐ Student ☐ Employee Job Title: \_\_\_\_\_ ☐ Other \_\_\_\_\_

Preferred Email address: \_\_\_\_\_

Unionized: ☐ Yes ☐ No If yes, please specify: \_\_\_\_\_

Please indicate Union Representative and phone number: \_\_\_\_\_

**NAME OF RESPONDENT (PERSON (S) ACCUSED):**Status of Respondent(s): ☐ Student ☐ Employee Job Title: \_\_\_\_\_ ☐ Other \_\_\_\_\_

School/Department/Worksite: \_\_\_\_\_

**Please indicate type of complaint:**

Description of Alleged Harassment/Discrimination: (Please consult the Board's Human Rights Policy, Workplace Harassment Prevention Policy, and Workplace Harassment Prevention and Human Rights Procedure before completing this section).

**1. ☐ Human Rights Code (Code) Harassment/Discrimination****Definition of Harassment under the Code and Board's Human Rights Policy:**

"a course of vexatious comment or conduct that is known or ought reasonably to be known to be unwelcome."

**The vexatious comment or conduct must be because of a Prohibited Ground of the Code (see below)**

**Discrimination under the Code:** People have the right to equal treatment and opportunities, without discrimination in the areas covered by the Code. Not all unfair treatment and not all harassment are covered by the Code. Code based harassment/discrimination requires that the harassment/discrimination must have been based on or because of a Prohibited Ground covered by the Code (see below).

**Prohibited grounds under the Ontario Human Rights Code:**

- |                                                                                                                                           |                                                                                                                           |
|-------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Age                                                                                                              | <input type="checkbox"/> Gender Identity                                                                                  |
| <input type="checkbox"/> Ancestry                                                                                                         | <input type="checkbox"/> Marital status (includes same sex partnership)                                                   |
| <input type="checkbox"/> Citizenship                                                                                                      | <input type="checkbox"/> Place of origin (where one was born)                                                             |
| <input type="checkbox"/> Colour                                                                                                           | <input type="checkbox"/> Race                                                                                             |
| <input type="checkbox"/> Creed (religion)                                                                                                 | <input type="checkbox"/> Sex (including pregnancy, sexual harassment )                                                    |
| <input type="checkbox"/> Disability or perceived disability<br>(Including mental or physical illness or injuries,<br>and some addictions) | <input type="checkbox"/> Sexual orientation                                                                               |
| <input type="checkbox"/> Ethnic origin                                                                                                    | <input type="checkbox"/> Record of Offences - Provincial Offences or<br>Pardoned Federal Offences (in employment<br>only) |
| <input type="checkbox"/> Family status                                                                                                    |                                                                                                                           |
| <input type="checkbox"/> Gender Expression                                                                                                |                                                                                                                           |



Ensure that you include (check off), the grounds upon which the complaint is based and why you believe so.  
**If you are unsure of the ground(s) simply indicate that in the description of the incident in the box below.**

**2. ☐ Workplace Harassment (Includes Sexual Harassment)**

**Definition of Workplace Harassment under the *Occupational Health & Safety Act (OHSA)* and Board's Workplace Harassment Prevention Policy:**

"engaging in a course of vexatious comment or conduct **against a worker, in a workplace** that is known or ought reasonably to be known to be unwelcome" or is Sexual Harassment

**Definition of Sexual Harassment under the *Occupational Health and Safety Act* and Board's Workplace Harassment Prevention Policy:**

"Engaging in a course of vexatious comment 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", or

"making a sexual solicitation or advance where the person making the solicitation or advance is in a position to confer, grant or deny a benefit or advancement to the worker and the person knows or ought reasonably to know that the solicitation or advance is unwelcome";

When describing the incident(s) that you believe was harassment or discrimination please include:

**What** happened? **Who** was involved? **When** did it happen and time)? **Where** did it happen? Were there any witnesses? Please do not name witnesses, refer to them as Witness A, Witness B, etc.

**Incident 1:**

• <b>Date:</b>	<b>Time:</b>	<b>Location:</b>
• <b>Witness(es):</b> _____		
• <b>Description of Incident:</b>		

**Incident 2:**

####• <b>Date:</b>	<b>Time:</b>	<b>Location:</b>
####• <b>Witness(es):</b> _____		
####• <b>Description of Incident:</b>		





**PRIVATE & CONFIDENTIAL**

**Appendix A**  
**APPENDIX A**  
**Form 515A**  
December 2020

**Has this complaint been reported previously?** ☐ Yes ☐ No

If Yes, to who was it reported, and what actions were taken?

If No, please indicate why.

**Have you filed any other complaint regarding these incidents (e.g., grievance, human rights tribunal)?**

☐ Yes ☐ No

Please provide details:

Desired Resolution (What would you like to see happen?):

**Would you consider mediation as a form of early resolution to your concerns?**

Yes No

Please Explain

Complainant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

The information contained in this form is of a highly confidential nature and will be protected in accordance with the provisions of the ***Municipal Freedom of Information and Protection of Privacy Act***.

If the incident meets the threshold assessment for a complaint, the respondent will be notified in writing about the complaint and the allegations in accordance with the Workplace Harassment Prevention and Human Rights Operational Procedure PR 515.

**INSTRUCTIONS FOR HANDLING THIS FORM:** Please email the form to [HumanRightsOffice@tdsb.on.ca](mailto:HumanRightsOffice@tdsb.on.ca) or place it in a sealed envelope marked "**PRIVATE AND CONFIDENTIAL**" and send it to the Human Rights Office, Toronto District School Board, 5050 Yonge Street, 4th Floor, Toronto, M2N 5N8

**Toronto District School Board**

Operational Procedure PR515

**Title: WORKPLACE HARASSMENT PREVENTION AND HUMAN RIGHTS**

Adopted: June 29, 2001

Effectuated: June 29, 2001

Revised: October 24, 2017, December 10, 2019, December 11, 2020Reviewed: October 24, 2017, December 10, 2019, December 11, 2020

Authorization: Executive Council

**1.0 RATIONALE**

The Toronto District School Board (TDSB or the Board), is committed to providing an equitable, safe, nurturing, positive learning and working environment, free of harassment and discrimination, where every individual is treated with dignity and respect.

This operational procedure is designed to support the implementation of the Workplace Harassment Prevention Policy (P034) and Human Rights Policy (P031) and fulfills the Board's requirements under the *Occupational Health and Safety Act (OHSA)* and Ontario *Human Rights Code* (the *Code*).

**2.0 OBJECTIVE**

To provide information and instruction, regarding the process for how to effectively prevent and, where necessary, address harassment and unlawful discrimination. All parties involved in a matter under these procedures (including staff, management, union/federation/association and Human Rights Office) must work together to prevent and address harassment and unlawful discrimination.

**3.0 DEFINITIONS**

*Allegation* is an unproven claim or assertion that someone has done something wrong based on one's belief that a violation of the Board's Harassment/Discrimination policies has occurred.

*Balance of Probabilities* is the standard of proof which is satisfied where a proposition is reasonable, more probable than not and more probable than any other proposition based on all the evidence.

*Board* is the Toronto District School Board (also referred to as TDSB). The TDSB is an employer, as defined by the OHSA.

*Complainant* is anyone who makes a complaint under the Board's harassment/discrimination policies, alleging that harassment/unlawful discrimination has occurred.

*Discrimination* is any practice or behaviour, whether intentional or not, which has a negative effect on an individual or group because of any of the prohibited grounds of the *Code* including race, ancestry, place of origin, ethnic origin, colour, citizenship, creed (religion), sex, gender identity, gender expression, sexual orientation, age, marital status, family status, disability/perceived disability, or receipt of public assistance (applies to the social area of housing only).

Discrimination may arise as a result of direct differential treatment or it may result from the unequal effect of treating individuals and groups in the same way. If the effect of the behaviour on the individual or group is to withhold or limit full, equal and meaningful access to, for example, goods, services, facilities, employment, housing, accommodation, that is available to other members of society, it is discrimination.

*Employee and Family Assistance Program (EFAP)* is a confidential and voluntary support service that offers assistance to eligible employees of the Board and their families, as set out in the applicable terms and conditions of employment, for any work, life or health concern. This may include immediate and confidential support regarding workplace challenges, addictions, managing relationships/family and achieving well-being.

*Harassment* is a course of vexatious comment or conduct known or ought reasonably to be known to be unwelcome.

*Human Rights Office (HRO)* is an office within the TDSB, that is mandated to be neutral and unbiased and is a resource to all covered under this procedure. The HRO implements the Board's policies and procedure on harassment and discrimination, as well as supports adherence to the associated laws as they relate to harassment and discrimination (e.g., Ontario *Human Rights Code* and *the Occupational Health & Safety Act*).

*Mediation* is a confidential voluntary process that parties to a complaint may agree to participate in, whereby a neutral unbiased third party facilitator is in direct communication between the parties to a complaint, to effect an agreed upon resolution. It is an opportunity to resolve disputes in a mutually respectful manner.

*Reprisal* is any harassment, intimidation, threats, or discipline against a person (e.g., complainant, respondent, witness or investigator) for making a report to the Board regarding an incident/complaint of alleged harassment/discrimination. It can also include retaliation against someone who has participated in or is believed to have participated in a process to address a matter under the Board's harassment and discrimination policies and associated procedure. Reprisal is prohibited under the Board's harassment/discrimination policies and procedure.

*Respondent* is anyone who has a complaint made against them under the Board's harassment/discrimination policies.

*Student* is anyone regardless of age, who is enrolled in any educational program offered by the Board.

*Supervisor* is a person who has charge of a workplace or authority over workers, in accordance with the OHSA.

*Systemic Discrimination* is discrimination that arises from policies, procedures, practices, and conduct which may not be discriminatory in their intent but adversely impact individuals or groups protected by the prohibited grounds of the Code.

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

*Vexatious* is conduct that is inappropriate, unnecessary and that a reasonable person would consider offensive, distressing or demeaning.

*Vexatious Complaints* ~~complaints~~ are complaints that are brought forward without sufficient merit, solely to cause annoyance or distress. Vexatious complaints are prohibited under the Board's harassment/discrimination policies and procedure.

*Workplace* under the OHSA is any land, premises, location or thing at, upon, in or near which a worker works. For the purpose of this procedure it also includes any place where individuals perform work or work-related duties or functions. Schools and school-related activities, such as extra-curricular activities and excursions comprise the workplace, as do Board offices and facilities (including eating, lounge/changing areas and vehicles used for work purposes or on work property). Conferences, workshops, training sessions and staff functions (e.g., staff parties, retirement celebrations), fall within the scope of this procedure.

*Workplace Harassment* under the OHSA is engaging in a course of vexatious comment or conduct against a worker in a workplace that is known or ought reasonably to be known to be unwelcome, or is workplace sexual harassment.

*Workplace Sexual Harassment* is engaging in a course of vexatious comment 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; or making a sexual solicitation or advance where the person making the solicitation or advance is in a position to confer, grant or deny a benefit or advancement to the worker and the person knows or ought reasonably to know that the solicitation or advance is unwelcome.

#### 4.0 RESPONSIBILITY

Executive Superintendent, Human Rights, ~~Equity, Engagement~~ and Indigenous Education ~~Well-being~~

#### 5.0 APPLICATION AND SCOPE

This procedure applies to all employees (including contract, temporary, permanent and occasional employees).

It addresses harassment and unlawful discrimination from all sources including volunteers, students, trustees, as well as members of the public.

The Board also has policies/procedures in place to deal with other forms of harassment or offensive conduct. See section 9.0 for a complete list of other relevant policies and procedures.

#### 6.0 PROCEDURES

##### 6.1. General

All persons covered under this procedure are responsible for creating, maintaining and contributing to a climate of understanding and mutual respect for the rights and dignity of each person.

Anyone within the scope of these procedures who has a concern regarding potential harassment or discrimination may attempt the following before filing a formal complaint:

- (a) If possible and practical, make it known to the person who is causing the offense, that the behaviour is unwelcome and ask that all offensive behaviour stop.

If approached in the above manner it is expected that the individual will work with the person raising the concern to make all reasonable efforts to resolve the matter. If an individual is not comfortable approaching the

person causing offense or an individual is approached and the behaviour does not stop, discuss the concerns with your immediate supervisor or another member of management;

- (b) Seek advice from a union/federation/association representative (where applicable);
- (c) Contact the Human Rights Office (HRO) to consult, even if there is no intent to file a complaint;
- (d) If eligible, utilize the TDSB Employee and Family Assistance Program (EFAP);
- (e) Do not discuss the complaint or intent to file a complaint with colleagues unless they are your support person (see section 6.3), as this could adversely impact the investigative process, if an investigation is required.

## 6.2. Dual Processes

Nothing in these procedures denies or limits access to other avenues of redress available under the Ontario *Human Rights Code*, *Occupational Health & Safety Act* and/or through filing a grievance.

—The TDSB's internal ~~formal~~ complaint resolution process provides for an investigation appropriate in the circumstances, resulting from an incident/complaint of harassment/discrimination. -The HRO, in consultation with the Executive Officer, Employee Services, may decide to postpone, suspend, or cancel any process/investigation regarding a complaint if the continuance of the process/investigation would duplicate or prejudice (damage) another proceeding. -In coming to a decision these factors will be considered:

- (a) The Board's responsibility to resolve harassment and discrimination complaints;
- (b) The recognition that grievances may be filed simultaneously with complaints in order to comply with timelines. In such cases one matter may be held in abeyance until the other process is complete, as determined in consultation with Employee Services and with agreement from the union as it pertains to grievances; and/or
- (c) Other legal procedures that may be initiated in order to protect statutory rights, e.g., the Human Rights Tribunal of Ontario (HRTTO).

In all such cases the complainant will be advised of the decision to postpone, suspend, or hold in abeyance their complaint and the reasons why.

### 6.3. Support Person for Complainants, Respondents and Witnesses

- (a) Prior to initiating a complaint and throughout the complaints process complainants, respondents and witnesses have a right to assistance from a support person. -A support person may include a:
- Colleague
  - Family Member
  - Union/Federation/Association/Network Representative (in accordance with the practices/policies of the respective organization)
  - Joint Health & Safety Committee Representative
  - Parent/Guardian or Other Caregiver
  - School Support Staff
  - Student
  - Teacher
  - Translator/Interpreter
- (b) All persons acting as a support person within the scope of these procedures must keep any information regarding the complaint confidential. Some support persons may be required to sign a confidentiality agreement when attending investigation interviews. (TDSB staff or union/federation/association/network representatives are not required to sign an agreement)
- (c) The role of the support person is to be available to a party to an investigation to provide assurance, console and/or general emotional support or advice. Unions/Associations and Federations may have other responsibilities to their members in this capacity; however, all support persons must not answer questions on behalf of the interviewee or obstruct in any way, the investigation process. The investigator reserves the right to discontinue any investigation interview whereby any party to a complaint or the support person is uncooperative.
- (d) Investigation participants (complainants, respondents and witnesses) and support persons who are staff of the Board, are entitled to be permitted time away from work with pay, providing the appropriate arrangements (including supervisory/management approval), are made with their direct Supervisor or next level management, if the Supervisor is the subject of the complaint. These arrangements should be made by staff and may involve the support of their union/association/federation/network representative, as required.

#### 6.4. Complaint Procedures

##### *Employees*

- Employee incidents/complaints of alleged harassment or discrimination should be made to an immediate supervisor, or the Human Rights Office. Reports can be made verbally; however, it is preferred that the appropriate Workplace Harassment and Human Rights Incident Reporting Form (see Appendix A) is completed. All incidents/complaints of harassment/discrimination whether verbal or in writing must be investigated in a manner deemed appropriate in the circumstances. Employees may also consult with their union/association/federation/network representative when reporting an incident/complaint.
- If the employee complaint is regarding their supervisor or the employer the complaint should be made directly to the Human Rights Office at [HumanRightsOffice@tdsb.on.ca](mailto:HumanRightsOffice@tdsb.on.ca)

##### *Students*

- Student complaints of alleged harassment/discrimination should be reported to the school administration and will be addressed through the appropriate school policy or procedure (e.g., Caring and Safe Schools Policy, Bullying Prevention and Intervention Procedure, Sexual Misconduct by Students Procedure, Parent Concern Protocol).
- Student complaints against the administration should be forwarded to the Board's Human Rights Office. The complaint will be addressed through the appropriate school policy or procedure (e.g., Caring and Safe Schools, Parent Concern Protocol) in cases of systemic concerns, the matter may be referred to an external investigator.

##### *Human Rights Office*

- Incidents/Complaints of harassment/discrimination regarding the Human Rights Office will be forwarded to the Executive Superintendent, Human Rights, ~~Equity, Engagement~~ and Indigenous Education ~~Well-being~~.

##### *Trustees*

- Incidents/complaints against a Trustee, alleging harassment and/or discrimination will be forwarded to the Board's Integrity Commissioner and will be addressed under the Board Member Code of Conduct policy and procedure.

##### *Executives*

- Incidents/Complaints against a Board Executive, alleging harassment and/or discrimination will be forwarded to the Director of Education, who will seek advisement from the Board's General Counsel in engaging the services of a third party external investigator, as deemed appropriate.



*Director of Education*

- Incidents/Complaints against the Director of Education, alleging harassment and/or discrimination will be forwarded to the Chair of the Board, who will seek advisement from the Board's General Counsel in engaging the services of a third party external investigator, as deemed appropriate.

*Members of the public*

- Incidents/Complaints of alleged harassment/discrimination against a member of the public by Board staff will be forwarded to the immediate supervisor of the affected area the Respondent was working or participating in at the time of the alleged incident, or the Board's Human Rights Office.

All staff responsible for receiving complaints of harassment/discrimination under these procedures must ensure they are aware of the appropriate procedures for responding to a complaint (section 6.5 and 6.6 of these procedures). They may also consult with the Board's Human Rights Office regarding appropriate next steps, if required.

#### **6.5. Managerial Response to an Incident / Complaint of harassment / discrimination**

- (a) Supervisory /managerial staff may become aware of incidents of harassment or discrimination in the working or learning environment in different ways. They may observe it directly or receive a report from the individual affected. They may even hear about it from a third party. It is important that supervisory and managerial staff pay attention to symptoms of possible harassment or discrimination (e.g., decreased productivity, absenteeism), and intervenes.
- (b) Those experiencing harassment or discrimination may be reluctant or embarrassed to come forward. A timely resolution of an incident/complaint of harassment/discrimination can prevent escalation of a matter and further negative consequences while promoting the restoration of a healthy learning or working environment.
- (c) In all cases, supervisory and managerial staff has a duty to respond to and take action to resolve any alleged or suspected incidents/complaints involving harassment/discrimination.
- (d) The OHSA requires that any incident/complaint of workplace harassment requires an investigation deemed appropriate in the circumstances. For the purposes of this procedure that includes (at a minimum), interviewing

the complainant and interviewing the respondent and any relevant witnesses, and making a determination if harassment occurred.

- (e) When an incident/complaint of harassment/discrimination comes to the attention of managerial/supervisory staff they should ensure the well-being of the parties involved, document any pertinent information provided and advise that the matter is taken seriously, will be looked into and supervisory staff will get back to them regarding next steps (generally, within 7 days).
- (f) Generally, supervisory/managerial staff will investigate workplace harassment incidents/complaints. Human Rights Code based harassment or discrimination complaints may be investigated by supervisory/managerial staff depending on the complexity of the matter and nature of the allegations. Supervisory/managerial staff should consult with the HRO in order to make that determination.
- (g) If supervisory/managerial staff conducts an investigation it should be done in accordance with ~~section 6.7 of~~ these procedures.

#### **6.6. HRO Response to an Incident /Complaint of Harassment / /Discrimination**

- (a) The HRO is neutral and unbiased and is a resource for all covered under this procedure. The HRO will work to prevent workplace harassment and unlawful discrimination as well as respond to inquiries, incidents and complaints.
- (b) The HRO will respond to complaints by conducting preliminary assessments of incidents/complaints of harassment/discrimination, in order to determine if on the face of the complaint the allegation(s) meet the definition of harassment/discrimination and to determine appropriate next steps to deal with an incident/complaint, in a manner deemed appropriate in the circumstances.

This may include re-directing matters to another department of the Board, as deemed appropriate by the HRO. Actions taken or fact-finding conducted for the purposes of an assessment will be deemed an investigation appropriate in the circumstances for purposes of the OHSA, if the assessment determines that on the face of the complaint no further investigation of the matter is warranted.

- (c) If it is determined that on the face of the complaint it rises to the definition of harassment/discrimination, the HRO will retain carriage of the complaint and assign it to an investigator (HRO investigator, appropriate Supervisory or Managerial staff, or in some cases an external third party

investigator). Generally, Workplace Harassment investigations will be completed by Supervisory or Managerial staff, as well as some Human Rights complaints, depending on complexity. -Generally, the HRO will investigate Human Rights complaints that are more complex and potentially Workplace Harassment complaints that are more complex, depending on the circumstances. External Third Party investigators may be used for various reasons, including but not limited to the complexity or size of a complaint/investigation; availability of internal resources etc.

In certain circumstances, the HRO may determine that the matter is more appropriately investigated by an investigation team, in which case a lead investigator will be assigned.

- (d) If on the face of the complaint the allegations do not meet the definition of harassment/discrimination, the HRO may forward the complaint to another area of the Board to address (e.g., appropriate supervisory/managerial staff, employee services in cases involving alleged culpable behaviour, Health & Safety in matters relating to workplace violence), or the HRO may recommend Mediation in cases involving workplace conflict or as deemed appropriate in the circumstances. In such cases, supervisory staff in conjunction with the union/association/federation/network representative and the affected employee(s) should give consideration to whether a third party mediator (agreeable to all parties), is appropriate.

In some cases, the HRO may determine that no further action is required.

- (e) Where it is determined by the HRO that the matter is more appropriately dealt with by another department of the Board, the complainant will be notified prior to forwarding the complaint. In such cases, the alleged Respondent is typically not notified by the HRO.
- (f) The HRO may also determine that the matter complained of has already been dealt with through another forum (i.e., grievance/arbitration, employee services disciplinary process). -In such cases, the complainant will be advised of this by the HRO prior to file closure.
- (g) The HRO has discretion to limit the allegations in any complaint due to duplication of information or in order to streamline the complaint, without loss of any substantive information.
- (h) Anonymous complaints against an individual or group will be treated in a manner deemed appropriate in the circumstances by the HRO, including exploring other alternatives to address the matter, including, but not limited to, the use of workplace environmental scans, generalized training for staff, or feedback provided to the individual/group. This will be done

in consultation with Employee Services and/or Management of the affected area. No formal summary in writing will be provided to any party to an anonymous complaint.

- (i) Group Complaints are very challenging situations for all involved.- The HRO recommends that those who have concerns under these procedures should submit their concerns separately. Approaching someone to participate in a group complaint, whereby an issue had not been identified by them previously can potentially create other issues in the workplace that may not have otherwise been present. This is in no way to limit any staff from coming forward with concerns. In situations involving multiple parties to a complaint, employees are encouraged to confidentially speak with their respective union/association/federation/network representative or contact the HRO and encourage others with concerns to individually do the same.

## **6.7. Investigations – Preliminary Considerations**

### **6.7. Investigation Process**

#### **(a) Responsibility**

- (i) Supervisory/Managerial staff investigating a matter under this procedure, has responsibility for ensuring they are following this procedure and are appropriately trained to investigate the matter. If in doubt, please contact the HRO for advice.
- (ii) All persons investigating matters under this procedure, including external investigators, will have regard for these procedures. Slight variations in process may be acceptable, as deemed appropriate by the HRO.
- (iii) The person conducting the investigation, whether internal or external to the workplace, must not be directly involved in the alleged incident(s) or complaint(s) of harassment/discrimination, and must not be under the direct control of the alleged harasser, in accordance with the OHSA.

#### **(b) Confidentiality**

Any person reporting an incident or complaint of harassment /discrimination or who participates in a process to resolve a matter under this procedure (including investigators), must keep that information confidential and not disclose or release to anyone any information about the incident/complaint except to the extent necessary to protect an employee (s) (e.g., safety plan or separation of parties through the Administration/Board Health & Safety office), to investigate the

incident/complaint (e.g., make arrangements for release time, questioning witnesses etc.), to take corrective action (e.g., consultation with employee services regarding appropriate action based on investigation findings), or as otherwise required by law (e.g., Tribunal or other court proceedings), in accordance with the OHSA. This extends to details of a complaint (including its existence), meetings about an incident/complaint, identifying information about a person including names of witnesses, contact made with an investigator etc. This is a continuous obligation that extends beyond employment with the TDSB.

Seeking advice from an employee's own union/association/federation/network or legal representative in addressing harassment/discrimination is permitted, and may be required by some Collective Agreements and/or Terms and Conditions of Employment. While staff may seek advisement from their own legal representative, at their own cost, the HRO only recognizes an employee's union/association/federation/ representatives as the employee's legal representative. The HRO will not communicate directly, with a staff's lawyer.

Note: The HRO may be required to advise other areas of the Board with regards to the existence of a complaint in order to avoid a duplication of processes. In such cases, only the minimum information required will be provided, as determined by the HRO. For example, upon receipt of a harassment or discrimination grievance Employee Services may inquire with the HRO, as to the existence of a complaint in the HRO regarding the matter and the status of the complaint.

Notwithstanding the above, additional information may be required for legal proceedings with the appropriate formalized request to the HRO (e.g., letter requesting production of documents, HRTD Application response required etc.). HRTD proceedings require disclosure of the complaint and the resolution, if any. -The HRO will not provide any complete file to any area of the Board unless required by law.

### (c) Time Limit

(a) Complaints made under these procedures must be made within one year  
Written notification of complaint

~~All parties to a complaint will be notified in writing, as soon as practical and prior to an investigation interview, as to the date of existence of the alleged complaint, the allegations, who filed the complaint and who it was filed against (if multiple persons, each person will be advised individually without advising of the other parties named in the complaint).~~

~~If an incident(s) or the last incident/complaint of harassment/discrimination in a series of incidents. Permission to proceed with a complaint outside is reported to managerial/supervisory staff or the HRO, in the absence of this timeline a formal written complaint, the Board is still required to investigate, in which case a general statement of the allegations or some other form of written notification may be obtained in consultation with the provided to parties (complainant/Respondent).~~

~~All written notification to parties (complainants, respondents and witnesses) by the investigator, should include cautions regarding maintaining confidentiality and not engaging in reprisal/threats of reprisal. The notification should include copies of the Board's Human Rights Office. The HRO must be satisfied that the delay was incurred in good faith and no substantial prejudice or unfairness will result to any person affected by the delay. Complaints regarding sexual and Workplace Harassment Prevention Policies and procedure, regardless to the type of complaint being investigated (workplace harassment/assault will also be assessed on a case by case basis.; human rights etc.)~~

(d) Safety and Separation of parties (Interim Measures)

All investigators will explore with parties whether there are any immediate concerns for physical safety or whether separation of parties needs to be arranged as an interim measure during the course of the investigation.

~~(c)(a) Any decision around separation of parties will be made with the supervisory or next level up managerial staff in consultation with Employee Services. Safety and Separation of parties (Interim Measures)~~

~~All investigators will explore with parties whether there are any immediate concerns for physical safety or whether separation of parties needs to be arranged as an interim measure during the course of the investigation.~~

~~Any decision around separation of parties will be made with the supervisory or next level up managerial staff in consultation with Employee Services. -The appropriate union/federation/association/network will be contacted as deemed appropriate. -Supervisory staff/Employee Services may also consult the HRO regarding the general nature of the complaint/allegations to assist in their decision-making.~~

Supervisory staff/Employee Services may also consult the HRO regarding the general nature of the complaint/allegations to assist in their decision-making.

Considerations will include, but are not limited to the following:

- Whether the continued presence of the respondent will impair the complainant's ability to function at school or work
- Whether the Respondent poses a risk to the complainant or others



- Whether there has been a reprisal or a real threat of reprisal exists

Where supervisory staff determines, (in consultation with Employee Services), that separation of parties is appropriate and required the parties shall be separated, pending the final disposition of the complaint. Separation of parties may include:

- Working in the same physical location with strict parameters around having no contact with each other (this must be put in writing)
- Temporarily relocating one party to the complaint, by moving to an alternate location (generally, the respondent will be the party moved; however, given certain circumstances it may be appropriate for the complainant to be moved, as determined by supervisory staff and Employee Services. (Consideration should also be given to the complainant's preference.)
- In rare occasions, a party may be placed on home assignment without loss of wages or benefits. Students may be excluded from their school(s) in accordance with Board procedure governing student behaviour, and the *Education Act*.
- To the extent practicable, complainants and respondents using Board premises or premises where Board programs take place shall be required to have no contact either direct or indirect with each other until the investigation has been concluded and recommendations acted upon.
- Parties to a complaint who have been moved or on home assignment as per above, may be moved back or resume their previous position as soon as Supervisory staff/ Management determines (in consultation with the complainant and respondent and Employee Services), that separation is no longer necessary.
- A separation of parties pursuant to these procedures does not constitute "discipline" or a "transfer" within the meaning of any Collective Agreement or Terms and Conditions of Employment and is not considered to be Reprisal in the meaning of this procedure.

#### (e) Medical/Other leaves during an investigation

If a complainant or respondent is on medical/other leave at any point during the complaints process (including during an investigation), it is incumbent upon them or their representative (if applicable) to advise the investigator and indicate whether the party is able to participate in the complaint/investigative process while on leave.

For medical leaves, if the party is still able to participate in the complaint/investigative process they must provide the Human Rights Office or appropriate supervisory/managerial staff with medical

documentation advising the employee is medically fit to participate in the complaint/investigative process while on leave.

If the party to the complaint is not able to participate or otherwise advise the investigator of the leave, the matter may be held in abeyance or the process may be otherwise delayed, as determined by the investigator, until the return from leave.

Any medical documentation forwarded to the HRO will be kept securely in a locked file cabinet.

(f) Addressing incidents/complaints of harassment/discrimination in the absence of a formal written complaint:

It may come to the Board's attention that there is alleged harassment/discrimination where the alleged victim(s) do not wish to/have not come forward. Or, a complainant may determine that they do not wish to proceed with a complaint or may withdraw a complaint. In those circumstances, the Board may request a reason for withdrawing a complaint or may determine an investigation deemed appropriate in the circumstances is required in the absence of a formal written complaint, or may initiate an investigation with the intent of determining if harassment/discrimination is occurring and stopping it, in order to fulfil the Board's legislated requirement in providing a workplace free of harassment/discrimination.

## **6.8. Investigation Processes**

Either the Expedited or the Formal investigation process may be used to investigate incidents/complaints as is appropriate in the circumstances as determined by the HRO if the HRO has carriage of the matter, or as determined by the supervisory/managerial staff conducting the investigation if the HRO does not have carriage the matter. Factors to consider in determining which process is appropriate in the circumstances include the size, complexity, and the nature and extent of the potential impact of the investigation. The Expedited Investigation Process may be used to investigate incidents that occurred or complaints that were made prior to the amendments to this procedure introducing the Expedited Investigation Process.

### **6.8.1. Formal Investigation Process**

The following procedures will be followed when the investigator/HRO elects, in accordance with section 6.8, to use the Formal Investigation Process.

#### **(a) Written notification of complaint**



All parties to a complaint will be notified in writing, as soon as practical and prior to an investigation interview, as to the existence of the complaint, the allegations, who filed the complaint and who it was filed against (if multiple persons, each person will be advised individually without advising of the other parties named in the complaint).

If an incident/complaint of harassment/discrimination is reported to managerial/supervisory staff or the HRO, in the absence of a formal written complaint, the Board is still required to investigate, in which case a general statement of the allegations or some other form of written notification may be provided to parties (complainant/Respondent).

All written notification to parties (complainants, respondents and witnesses) by the investigator, should include cautions regarding maintaining confidentiality and not engaging in reprisal/threats of reprisal. The notification should include copies of the Board's Human Rights and Workplace Harassment Prevention Policies and procedure, regardless to the type of complaint being investigated (workplace harassment, human rights etc.)

#### (a)(b) Timelines

~~(i) Complaints made under these procedures must be made within one year of the date of the alleged incident(s) or the last incident of harassment/discrimination in a series of incidents. Permission to proceed with a complaint outside of this timeline may be obtained in consultation with the Human Rights Office. The HRO must be satisfied that the delay was incurred in good faith and no substantial prejudice or unfairness will result to any person affected by the delay. Complaints regarding sexual harassment/assault will also be assessed on a case by case basis.~~

- (i) Incidents/complaints brought to the attention of Supervisory staff or the HRO will be acknowledged in writing within seven (7) business days of receipt or knowledge of the incident/complaint.
- (ii) The complainant will be advised by supervisory staff or the HRO of the next steps regarding their complaint within ten (10) business days of acknowledging the incident/complaint.
- (iii) Generally, matters assigned for investigation will be investigated within 90 (and up to 150) days of being assigned, depending on the availability of parties to the complaint, complexity of the matter – number of parties, nature of allegations, time of year the complaint is received (e.g., summer for school-based complaints) etc. Any delays in timelines will be communicated to complainants and respondents including the reasons for the delay.

- (iv) While the process may begin for complaints received in May/June or throughout the summer for school-based complaints, ultimately the complaint may be held in abeyance until the following September due to the lack of availability of school based staff, representatives etc. during that time. In such cases, the HRO/Supervisory staff will advise the parties as soon as practical.
  - (v) If an investigation is initiated, the investigator will prepare a written draft summary of the findings of the investigation and forward to the complainant and respondent (if multiple parties, each will receive individual summaries). Parties will have seven (7) business days to respond.
  - (vi) The investigator will take any responses to the draft summary into consideration and issue a final summary to the parties within seven (7) business days of the draft response due date.
  - (vii) Final summaries will also be forwarded to the next level manager for the complainant and respondent at the time the final summary is provided to them, along with any recommendations to follow-up with Employee Services if findings are made or other specific follow-up is otherwise required.
- ~~(ii) Any actions that will be taken as a result of the findings of the investigation must be communicated in writing to the Complainant and Respondent within ten (10) business days of supervisory/managerial staff receiving the summary of findings.~~
- ~~(iii) Any action (disciplinary or remedial etc.), that will be taken by supervisory/managerial staff as a result of the findings of an investigation must be outlined on the Action Plan Template sent by the HRO, signed and sent back to the HRO within ten (10) business days of receiving the summary of findings.~~
- ~~(iv) The HRO will monitor the Action Plans to ensure the agreed upon action is taken by supervisory/managerial staff.~~
- (viii) Supervisory staff, the HRO and any investigator conducting an investigation under the Formal Investigation Process ~~this procedure~~, will have regard for these timelines. From time to time there may be delays; however, it is incumbent upon the responsible party (supervisory staff, HRO or other investigator) to advise the parties of the delay and any reasons why.

~~(b)~~(c) Investigation Fact-finding Process

- (i) Parties to a complaint should be invited to an investigation interview within a reasonable time, if possible. They should be advised that they may bring a representative/support person. Complainants should be advised that they should check to see if their association/federation/network offers representation for complainants, as some do not. Conversely, as a Respondent some Collective Agreements require that a Respondent must have representation.

Investigators should confirm with the interviewee in advance of the interview, who their support person will be (if any), to ensure there is no conflict of interest with their choice. It is up to the investigator to determine if there is a conflict of interest with the choice of support person/representative.

- (ii) Generally, in most circumstances it is appropriate to interview the complainant first, followed by the respondent. Parties should be asked for witnesses who may have relevant information and any relevant witnesses –should then be interviewed (separately), as determined by the investigator.
- (iii) Investigators should prepare questions in advance of the interview and take detailed notes in the interview and allow the interviewee to review the notes and sign/initial to confirm accuracy.
- (iv) The investigator is responsible for determining the appropriateness of the questions being asked. -Information outside of the initial written notification of the complaint may come to the attention of the investigator during the course of the investigation, or the investigator may learn new information from witnesses. Relevant parties to the complaint are entitled to know of this new information and have a full opportunity to respond.
- (v) All interview notes maintained by the investigator are the property of TDSB. External investigators must provide their notes and documentation to the HRO upon conclusion of the investigation (unless legally privileged).
- (vi) An investigator conducting an investigation under this procedure has authority to access documents or materials (i.e., video footage) relevant to the complaint. -This does not include legally privileged documents or documents otherwise protected (e.g., information regarding juvenile criminal records).
- (vii) The investigator will consider all of the evidence gathered and determine whether or not an incident(s) of alleged

harassment/discrimination took place and whether it amounts to a breach of the human rights or workplace harassment prevention policy, using the standard of proof called the “balance of probabilities.”

(viii) Potential investigation outcomes are as follows:

- An investigation may determine that, on a balance of probabilities, an alleged incident (s) took place; however, upon investigation did not amount to harassment/discrimination;
- An investigation may determine that, on a balance of probabilities, an incident(s) took place and amounts to harassment/discrimination;
- An investigation may determine that, on a balance of probabilities, there is insufficient evidence to conclude whether an incident(s) took place, and consequently whether or not harassment/discrimination occurred;
- An investigation may determine that, on a balance of probabilities, the incident(s) did not take place and there is no finding of harassment/discrimination;
- An investigation may determine that the complaint is vexatious/frivolous.

(d) Communicating the Results of the Investigation

- (i) The investigator will prepare a written summary of the matter and send to the complainant and respondent respectively. -If the parties are represented by a union/association/federation/network a copy of the summary should be provided to them as well. A PDF document watermarked “draft” is recommended and the complainant (s)/ respondent (s) will have 7 business days to respond to the draft summary. If the HRO has carriage of the matter, the investigator will send the draft written summary to the HRO prior to sending it to the parties/representatives.
- (ii) The investigator will consider any responses to the draft summaries and determine if edits to the summary are warranted or further investigation required in order to close any perceived gaps. The summaries will then be finalized and sent to the respective parties and their representatives (if represented by a union/association/federation/network). Only one (1) draft written summary will be issued and one (1) final written summary (watermark removed). The final summary will indicate who will follow-up with the respective parties regarding the actions taken/to be taken as a result of the investigation findings.

- (iii) Final written summaries or a report of an investigation will be sent to the next level manager of the parties or supervisory staff responsible for determining/implementing any actions required, and to the HRO if the HRO has carriage of the matter.

#### 6.8.2 Expedited Investigation Process

A key objective of the Expedited Investigation Process is to provide for a more timely resolution of incidents and complaints of discrimination and harassment than may be afforded under the Formal Investigation Process. The following procedures will be followed when the investigator/HRO elects, in accordance with section 6.8, to use the Expedited Investigation Process. The investigator may adopt aspects of the Formal Investigation Process as is appropriate in the circumstances in the investigator's discretion.

##### (a) Notifications

- (i) The complainant will be advised by supervisory staff or the HRO of the next steps regarding their complaint within ten (10) business days of receipt or knowledge of the incident/complaint.
- (ii) All parties to a complaint will be notified, as soon as practical and prior to an investigation interview, as to the existence of the complaint, the allegations, who filed the complaint and who it was filed against (if multiple persons, each person will be advised individually without advising of the other parties named in the complaint).

A respondent is entitled to know and have the opportunity to respond to all allegations against them that are under investigation.

If an incident/complaint of harassment/discrimination is reported to managerial/supervisory staff or the HRO, in the absence of a formal written complaint, the Board is still required to investigate, in which case a general statement of the allegations may be presented to the parties (complainant/respondent).

The investigator should caution parties (complainants, respondents, and witnesses) regarding maintaining confidentiality and not engaging in reprisal/threats of reprisal, and refer them to the Board's Human Rights and Workplace Harassment Prevention Policies and procedure, regardless to the type of complaint being investigated (workplace harassment, human rights etc.)

(b) Timelines

- (i) Generally, matters assigned for investigation will be investigated within 90 days of being assigned, except in extenuating circumstances. Any delays in timelines will be communicated to complainants and respondents including the reasons for the delay.
- (ii) While the process may begin for complaints received in May/June or throughout the summer for school-based complaints, ultimately the complaint may be held in abeyance until the following September due to the lack of availability of school based staff, representatives etc. during that time. In such cases, the HRO/Supervisory staff will advise the parties as soon as practical.
- (iii) Supervisory staff, the HRO and any investigator conducting an investigation under the Expedited Investigation Process will have regard for these timelines. From time to time there may be delays; however, it is incumbent upon the responsible party (supervisory staff, HRO or other investigator) to advise the parties of the delay and any reasons why.

(c) Investigation Fact-finding Process

- (i) Parties to a complaint should be invited to an investigation interview within a reasonable time, if possible. They should be advised that they may bring a representative/support person. Complainants should be advised that they should check to see if their association/federation/network offers representation for complainants, as some do not. Conversely, as a Respondent some Collective Agreements require that a Respondent must have representation.

Investigators should confirm with the interviewee in advance of the interview, who their support person will be (if any), to ensure there is no conflict of interest with their choice. It is up to the investigator to determine if there is a conflict of interest with the choice of support person/representative.

- (ii) Generally, in most circumstances it is appropriate to interview the complainant first, followed by the respondent. Parties should be asked for witnesses who may have relevant information and any relevant witnesses should be interviewed (separately), as determined by the investigator.
- (iii) Investigators should take and retain detailed notes in each interview.

- (iv) The investigator is responsible for determining the appropriateness of the questions being asked. Information outside of the initial notification of the complaint may come to the attention of the investigator during the course of the investigation, or the investigator may learn new information from witnesses. Relevant parties to the complaint are entitled to know of this new information and have a full opportunity to respond.
- (v) All interview notes maintained by the investigator are the property of TDSB. External investigators must provide their notes and documentation to the HRO upon conclusion of the investigation (unless legally privileged).
- (vi) An investigator conducting an investigation under this procedure has authority to access documents or materials (i.e., video footage) relevant to the complaint. This does not include legally privileged documents or documents otherwise protected (e.g., information regarding juvenile criminal records).
- (vii) The investigator will consider all of the evidence gathered and determine whether or not an incident(s) of alleged harassment/discrimination took place and whether it amounts to a breach of the human rights or workplace harassment prevention policy, using the standard of proof called the “balance of probabilities.”
- (viii) Potential investigation outcomes are as follows:
  - An investigation may determine that, on a balance of probabilities, an alleged incident (s) took place; however, upon investigation did not amount to harassment/discrimination;
  - An investigation may determine that, on a balance of probabilities, an incident(s) took place and amounts to harassment/discrimination;
  - An investigation may determine that, on a balance of probabilities, there is insufficient evidence to conclude whether an incident(s) took place, and consequently whether or not harassment/discrimination occurred;
  - An investigation may determine that, on a balance of probabilities, the incident(s) did not take place and there is no finding of harassment/discrimination;
  - An investigation may determine that the complaint is vexatious/frivolous.

- (ix) The investigator must create and retain a document that sets out the investigator's findings of fact in relation to the allegations that were investigated, any conclusions reached, and reasons for those conclusions. If the HRO has carriage of the matter, the investigator will send this document to the HRO prior to communicating the results of the investigation to the parties.



(d) Communicating the Results of the Investigation

- (i) The complainant and respondent must be informed of the following in writing (the "Expedited Investigation Findings Letter"):
  - The results of the investigation.
  - Who will follow-up with the respective parties regarding the actions taken/to be taken as a result of the investigation findings.
- (ii) A summary of the reasons for the investigator's conclusions, including an explanation as to why the conduct in issue breaches/does not breach the policy, must be provided to the complainant and respondent, either orally or in writing, at the same time or within two (2) business days of the Expedited Investigation Findings Letter.
- (iii) The Expedited Investigation Findings Letter will be forwarded to the next level manager for the complainant and respondent or supervisory staff responsible for determining/implementing any actions required, and to the HRO if the HRO has carriage of the matter, along with any recommendations for the supervisor/manager to follow-up with Employee Services if findings are made or other specific follow-up is otherwise required.

6.9. Following the Investigation(a) Determination of Disciplinary/Remedial Action

Upon receipt of a written summary or report of findings of an investigation (Formal Investigation Process) or an Expedited Investigation Findings Letter, supervisory/managerial staff must make a determination (in consultation with Employee Services), as to whether any disciplinary or remedial action is required.

Having regard for the Board's commitment to Equity and Inclusion, **to the extent possible**, any disciplinary or remedial action taken with a student/employee as a result of the findings of an investigation under these procedures, should be done with an equity lens, utilizing the TDSB Equity Framework.

(b) Notification of Action to be Taken

In accordance with the OHSA, any actions that will be taken as a result of the findings of the investigation must be communicated to the complainant and respondent in writing. This should be done within ten (10) business days of the responsible supervisor/manager receiving the investigation

summary letter (Formal Investigation Process) or the Expedited Investigation Findings Letter. Information shared with complainants regarding actions taken with a respondent should not specify the exact discipline; however, should note if formal corrective action has been or will be taken, as well as measures put in place to prevent the matter from taking place again.

(c) Investigation Action Plans

Plan templates must be completed and signed by the

- (i) Any action (disciplinary or remedial etc.) that will be taken by supervisory/managerial staff as a result of the findings of an investigation where the HRO had carriage of the matter, must be outlined (in consultation with Employee Services) by the supervisor/manager on the Action Plan Template sent by the HRO, signed, and sent back responsible for taking action and forwarded to the HRO within ten (10) business days of the supervisor/manager receiving the final investigation summary letter or Expedited Investigation Findings Letter. (in consultation with Employee Services).
- (ii) The HRO will monitor the Action Plans to ensure the agreed upon action is taken.

(d) Medical/Other leaves during an investigation

~~If a complainant or respondent is on medical/other leave at any point during the complaints process (including during an investigation), it is incumbent upon them or their representative (if applicable) to advise the investigator and indicate whether the party is able to participate in the complaint/investigative process while on leave.~~

~~For medical leaves, if the party is still able to participate in the complaint/investigative process they must provide the Human Rights Office or appropriate supervisory/managerial staff with medical documentation advising the employee is medically fit to participate in the complaint/investigative process while on leave. If the party to the complaint is not able to participate or otherwise advise the investigator of the leave, the matter may be held in abeyance or the process may be otherwise delayed, as determined by the investigator, until the return from leave.~~

~~Any medical documentation forwarded to the HRO will be kept securely in a locked file cabinet.~~

~~(b) Addressing incidents/complaints of harassment/discrimination in the absence of a formal written complaint:~~

~~It may come to the Board's attention that there is alleged harassment/discrimination where the alleged victim(s) do not wish to/have not come forward. Or, a complainant may determine that they do not wish to proceed with a complaint or may withdraw a complaint. In those circumstances, the Board may request a reason for withdrawing a complaint or may determine an investigation deemed appropriate in the circumstances is required in the absence of a formal written complaint, or may initiate an investigation with the intent of determining if harassment/discrimination is occurring and stopping it, in order to fulfil the Board's legislated requirement in providing a workplace free of harassment/discrimination.~~

~~(c) Potential Investigation Outcomes~~

- ~~• An investigation may determine that, on a balance of probabilities, an alleged incident (s) took place; however, upon investigation did not amount to harassment/discrimination;~~
- ~~• An investigation may determine that, on a balance of probabilities, an incident(s) took place and amounts to harassment/discrimination;~~
- ~~• An investigation may determine that, on a balance of probabilities, there is insufficient evidence to conclude whether an incident(s) took place, and consequently whether or not harassment/discrimination occurred;~~
- ~~• An investigation may determine that, on a balance of probabilities, the incident(s) did not take place and there is no finding of harassment/discrimination;~~
- ~~• An investigation may determine that the complaint is vexatious/frivolous.~~

**6.8.6.10. Request for Review of A Final Investigation**

A complainant or respondent may request to the Executive Superintendent, ~~Human Rights Equity, Engagement and Indigenous Education Well-being~~, that a Review of the Investigation be undertaken.- The intent to submit a formal "Request for Review" must be made to the Human Rights Office in writing within seven (7) business days of the issuance of the final written summary of investigation findings (Formal Investigation Process) or the Expedited Investigation Findings Letter.- The actual document to be submitted for consideration of a review, outlining the ground(s) for the review (see below), and all relevant details must be submitted to the Human Rights Office within 15 business days of notifying the HRO of the intent to request a review.

The grounds for review are:

- The investigators did not comply with these procedures
- New evidence has become known to the complainant or respondent after the final decision but before the expiry of the seven (7) days limitation period for requesting a review.

No review of the final decision will be undertaken with regard to the claim that the conclusions drawn by the investigator(s) based on findings of fact were incorrect.

The Executive Superintendent, Human Rights-Equity, Engagement and Indigenous EducationWell-being shall convene a reviewer(s) and the reviewer will report its findings to the Executive Superintendent, Human Rights-Equity, Engagement and Indigenous EducationWell-Being who will affirm or amend a final decision or require that a new investigation be undertaken. The decision of the Executive Superintendent, Human RightsEquity, Engagement and Indigenous EducationWell-Being is final.

A response from the Executive Superintendent, Human Rights-Equity, Engagement and Indigenous EducationWell-Being regarding the Request for Review, shall be forwarded to the requester within 30 –days of convening a reviewer.

Wherever possible and appropriate, where a party to a complaint is facing disciplinary action as a result of investigation findings and has requested a review of the investigation, the disciplinary action shall be postponed until the outcome of the review.

## **6.11. Potential Disciplinary and Remedial Action**

### **(a) Potential Disciplinary Action**

#### *Student Respondents*

The Principal will follow the appropriate procedures for addressing student misconduct, as outlined in the Education Act and other specific Board policies and procedures.

#### *Employee Respondents*

The appropriate supervisory/managerial staff shall impose formal discipline (in consultation with Employee Services), as deemed appropriate based on the findings of the investigation (e.g., written warning, suspension, up to and including termination of employment with the Board).

In all cases where a complaint is substantiated and a determination is made to proceed with formal discipline, the appropriate supervisory/managerial staff shall ensure that a record (i.e., letter) of the disciplinary action is placed in the employee respondent's official personnel file. The supervisor/manager should keep their written notes of any non-disciplinary responses locked in their own files. Coaching letters or letters of counsel are not deemed formal discipline and are not included in an employee's personnel file.

**No other information or documentation regarding a harassment/discrimination complaint (other than disciplinary action), should be included in an employee's official personnel file.**

#### *Members of the Public Respondents*

Dependent upon the circumstances, parents, contractors etc. may be issued letters of disapproval/warning, revoking of permits/contracts, or an issuing of a no trespass warning.

#### (b) Potential Remedial Action

- Education or Training
- Counselling for the parties
- Customized workshops for staff/students
- Application of strategies to restore a positive working/learning environment
- Mediation
- Permanent separation of parties

#### (c) Actions related to Systemic Discrimination

Where systemic discrimination is found or suspected, proactive steps will be taken to ameliorate such conditions by:

- Conducting employment systems reviews
- Departmental re-organization
- Applying Employment Equity goals and timetables in specific areas
- Replacing learning/working materials
- In-service training for appropriate staff
- Reconsidering the assessment and placement procedures for students

### 6.9.6.12. -Informal Resolutions

#### (a) General Principles

~~(i)~~ Informal Resolutions are an important element in addressing alleged harassment/discrimination. Informal resolution is a potential alternative only after an initial fact-finding investigation, (at minimum speak to complainant and speak to respondent), has taken place and the investigator determines informal resolution is appropriate in the circumstances (in accordance with the OHSA).

Any form of informal resolution (e.g., apology, mediation) should be agreed to and signed off on by the parties to the complaint (complainant (s), respondent(s)).

In certain circumstances parties to a complaint or their representatives may request an informal resolution; however, that decision remains with supervisory/managerial staff or the Board's Human Rights Office, bearing in mind that all parties are expected to work together to prevent and address matters under these procedures.

(b) ~~(ii)~~ Member to Member Concerns

~~concerns:~~ In cases where members of the same union/association/federation/network are involved in a matter related to these procedures, the respective union/association/federation/network may wish to work with the parties involved to resolve the matter prior to it becoming a formal complaint. Those efforts are encouraged; however, if they are not successful or the matter is deemed to be too complex, the respective union, association, federation, network representative may wish to counsel/assist the member in bringing the report forward to their Principal, manager, supervisor or the HRO. It is understood that in some cases this may not be possible due to legal or internal policy/procedural requirements of the respective union, association, federation or network.

~~(a)~~(c) ——— ~~(iii)~~ Mediation

Mediation involves an unbiased third party acting as a facilitator to resolve disputes. Mediation is typically more appropriate when a matter is deemed to be workplace conflict. In cases where an investigation has commenced in regards to harassment/discrimination, mediation may be attempted during the course of the investigation only after an initial fact-finding process takes place (in accordance with the OHSA), and the investigator determines it is an appropriate form of resolution. All mediation and mediated resolutions should involve the parties respective union/association/federation/network representative and must be provided to parties to a complaint in writing and signed off by the parties. The mediator should be mutually agreeable to both parties.

If mediation is attempted during the course of an investigation and is unsuccessful, the investigation will resume and the parties will be advised by supervisory/managerial staff or the mediator, that information obtained during mediation, or any attempted settlement arising from mediation cannot be introduced as evidence in any subsequent formal proceeding.

Mediation may not be appropriate in the following circumstances; however, may be evaluated on a case by case basis:

- All parties are not committed to the process;
- One of the parties is in a position to confer, grant or deny a benefit;
- Students involved in disputes with employees or members of the public, including parents and community covered by this procedure.

The HRO may be consulted when considering a trained mediator, acceptable to both parties. In no circumstance shall a mediator be used who is involved in any capacity in the same learning or working environment/site as the parties with the exception of student peer mediators.

Student-led mediation using trained “peer mediators” may be used to facilitate an informal resolution between students, if acceptable to the parties. Principals shall ensure that any terms agreed to are met.

In all cases of mediated or informal resolution, supervisory/managerial staff is responsible for monitoring the situation to ensure the effectiveness of the resolution.

#### **6.10.6.13. Records**

All correspondence and other documents generated under these procedures and related policies must, subject to the Municipal Freedom and Information and Protection of Privacy Act, be marked, “PRIVATE AND CONFIDENTIAL” and must be stored in a locked and secure file in the office of management/supervisory staff or in a locked and secure file cabinet in the Human Rights Office. This includes, but is not limited to, copies of the complaint, details regarding the incident/complaint, investigation notes, statements, summaries or reports, and Expedited Investigation Findings Letters.

—No information regarding incidents/complaints of alleged harassment/discrimination shall be placed in an employee’s personnel file unless they have been found to have breached the harassment/discrimination policies/procedure and discipline is issued. The discipline will be the only



documentation that remains on the employee's file for the duration applicable as per the relevant Collective Agreement or Terms and Conditions of Employment.

—These records shall be kept for a period of 15 years from file closure, and if at that time there is no litigation, investigation or further activity under these procedures or other related policies involving a party to the original complaint, all records of the complaint (paper and electronic will be shredded or erased). A record of the type of document destroyed, by whom and when should be kept in accordance with Privacy legislation.

—Please note that it is unlawful for an employer to destroy any evidence or potential evidence that may be required in a matter that is currently, or that you may be aware may result in litigation. Contact TDSB legal services or the HRO, if in doubt.

—Statistics may be derived from information collected under these procedures and related policies; however, in all cases it will be presented in aggregate form without the use of names or other personal identifiable information.

## 7.0 EVALUATION

In order to ensure the effectiveness of these procedures they will be reviewed as required, and at least annually, in accordance with the *OHS*A.

## 8.0 APPENDICES

Appendix A: Workplace Harassment and Human Rights Incident Reporting Form (Form 515A)

## 9.0 REFERENCE DOCUMENTS

### Policies:

- Acceptable Use of Information Technology Resources (P088)
- Board Member Code of Conduct (P075)
- Caring and Safe Schools (P051)
- Gender-Based Violence (P071)
- Human Rights (P031)
- Occupational Health and Safety (P048)
- Reporting of Suspected Wrongdoing (Whistleblowing) (P066)
- Respectful Learning and Working Environment (P073)
- Workplace Violence Prevention (P072)



Operational Procedures:

- Board Code of Conduct (PR585)
- Bullying Prevention and Intervention (PR703)
- Code of On-line Conduct (PR571)
- Complaint Protocol for the Board Member Code of Conduct (PR708)
- E-mail Usage (PR572)
- Parent Concern Protocol (PR505)
- Promoting a Positive School Climate (PR697)
- Sexual Misconduct by Students (PR608)

Legislative Acts and Regulations:

- *Education Act*
- *Municipal Freedom of Information and Protection of Privacy Act*
- *Occupational Health and Safety Act*
- ~~Ontario Human Rights Code~~

**Key Features of the Expedited Investigation Process**

The Human Rights and Workplace Harassment Procedure, PR515, has been amended to introduce an Expedited Investigation Process that, in appropriate circumstances, can achieve a faster resolution for the parties. The existing investigation process, now called the Formal Investigation Process, remains intact to be used in appropriate cases.

Factors to consider in determining the appropriateness of employing the Expedited process include the size, complexity, and the nature and extent of the potential impact of the investigation. In cases where the HRO has carriage of the matter, the HRO would determine which process to use, and in other instances, the supervisor/manager investigating the matter would decide.

The new Expedited process balances being thorough and fair with being timely, giving life to the requirement to conduct an investigation that is appropriate and fair in the circumstances. The Expedited process retains procedural fairness but is faster. Noteworthy aspects of the Expedited Investigation Process are as follows:

- The complaint does not need to be acknowledged in writing. Instead, the complainant needs to be advised (orally or in writing) of the next steps within ten business days.
- The parties need notification, but not written notification, of the complaint and allegations. As a counterbalance, the Expedited process clarifies the respondent's right to know and have the opportunity to respond to all allegations under investigation.
- The caution to parties regarding confidentiality and reprisal may be given orally, and the parties can be orally referred to the policy and procedure.
- Interviewees do not review and sign off on interview notes.
- The investigator must create and retain a document with their findings and reasons, and the parties must be provided with a summary of reasons (including why the conduct in issue breaches/does not breach the policy) either orally or in writing. However, they do not receive a draft summary of the findings. The parties receive a letter with the results of the investigation and information as to who will follow up with them regarding actions to be taken as a result of the investigation.
- The investigation must be completed within 90 days except in extenuating circumstances, whereas the Formal process allows up to 150 days.
- Elements of the Formal process can be incorporated as appropriate in the circumstances.



## **PR511, Excursions Procedure: Revised Procedure**

**To:** Governance and Policy Committee

**Date:** 24 March, 2021

**Report No.:** 03-21-4062

### **Strategic Directions**

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

### **Recommendation**

It is recommended that the updated Excursions Procedure (PR511), as presented in this report, be received.

### **Context**

The tragic passing of a TDSB student participating in a camping excursion in July 2017 initiated excursions related policy and procedure reviews at all school boards across Ontario. The TDSB conducted both an internal and external review that included a review of its policies, procedures, forms and approval processes related to excursions that sought to identify gaps as well as seek opportunities for improvement and modernization.

Following the recommendations, the Excursions Policy (P033) was updated and approved in June 2019. The Excursions Procedure (PR511) was then revised and approved by Executive Council on February 2021 to support the implementation of the updated Excursions Policy (P033). The revised Procedure includes specific information defining school excursions, including those in the immediate community, excursions in local communities, excursions in and out of province, those involving high care activities, athletics and virtual excursions.

The revised Procedure also includes the implementation of a new online Excursion Management Application (EMA) to manage excursions and corresponding Excursion and Event Facility Directory to centrally manage excursion destinations and event facilities. The EMA Application will connect to other internal TDSB resources and

automate our current excursions management paper-based process to better support student safety and tracking of information.

EMA is ready for use immediately and will support the revised procedure.

Key features of EMA include:

**Staff:**

- The new EMA will replace the paper-based forms used by staff and improve online workflow and approval cycles. This includes forms 511 A, B, C, E, G, I, J, K, L, M, N, O, P, Q, R.
- Staff can now create excursion and athletic forms, access excursions management resources and submit their requests in a user-friendly and secure online application.
- Principals and Superintendents will be prompted to approve requests based on a predefined workflow that was developed into EMA, as well as report on excursions.
- Swim test results will be recorded within EMA where applicable.
- Informational dashboards with quick access to excursion data and statistics will be available.
- EMA will improve compliance and alignment with the Excursions Policy and Procedure and improve student safety through better access of quality data, improved reporting and online workflows to help improve student safety on excursions.
- EMA will be optimized to interface with Trillium and PowerSchools for relevant reports.

**Parents:**

- Parents/Guardians will login to our new *Parent Login* to approve excursion requests through the use of a Digital Signature. Parents will also use this portal to update their child's medical information and access various resources in support of excursions.
- The new Parent Login and online completion of forms will replace the paper copies of both the 511C and 511E for parents, now referred to as the *Parent/Guardian Permission for Excursion* form and *Medical Information Form* from.
- A direct link to School Cash online will be included in the messaging to families where applicable.

There were 13 pilot schools who participated in a pilot of EMA over the last two years and provided valuable feedback for the development of this application. A presentation to PIAC was made on October 22, 2019 informing the group of the work being done with opportunities for feedback and questions during development of the EMA.

Video tutorials and training documentation are prepared to support the Board wide roll-out.

Please note the following:

### **1. Paper Forms**

Some parents/guardians may not have access to a computer or may choose not to register a TDSB login account and access online systems such as EMA to complete online excursion forms. School staff will be able to print off a paper copy of the Parent/Guardian Permission for Excursion form and Medical Information Form from EMA with pre-populated information to send home with those students. Physical documents returned to school will be able to be scanned and uploaded into EMA to allow for a central repository of all related excursion information.

### **2. Parent Support Process**

The support process for parents/guardians will follow a similar support structure for students. Parents/guardians will be advised to contact their child's home school to address any questions or to assist in completing their online consent via the Parent Login process. For issues that cannot be resolved through online material, school staff can contact I.T. Services via the Service IT self-service portal to log a service request or call the Client Service Desk at 416-395-HELP (4357), Option 5 or "Chat with an Agent"

The updated Excursions Policy (P033) and Excursions Procedure (PR511) aligns with the TDSB's corporate strategy, provides for increased transparency and accountability, as well as efficiency for both TDSB staff and participant families.

### **Action Plan and Associated Timeline**

Subject to the Procedure being received at the Governance and Policy Committee, the revised Procedure will be provided to the Board of Trustees on April 28<sup>th</sup>, 2021 for receipt.

### **Resource Implications**

The TDSB has supports and resources already in place that will enable the proposed changes to be implemented.

### **Communications Considerations**

A communication plan has been established to support the rollout of the revised Excursions Procedure (PR511) and the Excursion Management Application (EMA). The

Excursions Procedure (PR511) is posted on the Board's internal and external websites. Communication to the system has been established with our TDSB Communications Officers including communication through Trustee Weekly, System Leaders Bulletin, Direct Line, and TDSB Connects to the various key stakeholders of the TDSB.

### **Board Policy and Procedure Reference(s)**

#### **TDSB Policies:**

- Equity Policy (P037) Excursions Policy (P033)
- Restrictions on Alcohol, Drug and Tobacco Use Policy (P095)
- Student Health Support Policy (P092)
- Transportation of Students Policy (P020)
- Caring and Safe Schools Policy (P051)
- Acceptable Use of Information Technology Resources (P088)
- Freedom of Information and Protection of Privacy (P094)

#### **TDSB Operational Procedures:**

- Excursions Procedure (PR511)
- Anaphylaxis in Schools Procedure (PR563)
- Asthma Management Procedure (PR714)
- Board Code of Conduct (PR585)
- Concussions Management Procedure (PR712)
- Diabetes Management Procedure (PR607)
- Medication Procedure (PR536)
- Transportation of Students Procedure (PR504)

### **Appendices**

- Appendix A: Excursions Procedure (PR511) – Revised Clean
- Appendix B: May 1, 2018: Ministry of Education Final Report Review and Assessment of Ontario School Board Policies and Procedures on Outdoor Ed/Excursions involving Water-Related Activities
- Appendix C – Excursions Procedure (PR511) – Revised – Tracked Changes

### **From**

Curtis Ennis, Associate Director, Equity, Well-being, and School Improvement at [Curtis.Ennis@tdsb.on.ca](mailto:Curtis.Ennis@tdsb.on.ca) or 416-396-9184

Georgia Gallagher, Centrally Assigned Principal, Leadership, Learning and School Improvement at [Georgia.Gallagher@tdsb.on.ca](mailto:Georgia.Gallagher@tdsb.on.ca) or 416-396-6334

David Hawker-Budlovsky, Centrally Assigned Principal, School Operations, Outdoor Education at [David.Hawker-Budlovsky@tdsb.on.ca](mailto:David.Hawker-Budlovsky@tdsb.on.ca) or 416-396-3408

George Kourtis, Program Coordinator, Health & Physical Education at [George.Kourtis@tdsb.on.ca](mailto:George.Kourtis@tdsb.on.ca) or 416-396-6000

# Toronto District School Board

---

## Operational Procedure PR511

Title: **EXCURSIONS**

Adopted: June 24, 2004

Effected: June 24, 2004

Revised: October 27, 2005, May 9, 2005, September 30, 2004, August 30, 2004, April 15, 2008; **February 2, 2021**

Reviewed: **February 2, 2021**

Authorization: Executive Council

---

### 1. RATIONALE

This Excursions Procedure (the "Procedure") supports the implementation of the Excursions Policy (P033) and is consistent with TDSB's commitment to the equitable inclusion of all students in Excursions, field trips and educational extra-curricular activities.

### 2. OBJECTIVE

To establish processes and requirements for carrying out safe and inclusive Excursions in accordance with the Excursions Policy (P033).

### 3. DEFINITIONS

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

*Commercial Excursion* refers to commercially organized or advertised events.

*Excursion* refers to any approved school or TDSB-organized educational activity involving students that takes place off school or TDSB property, which may include, but are not limited to, visiting a museum, leadership camps, end-of-year class trips, attending sports games and tournaments, overnight and weekend trips, physical education activities, interschool athletics/activities, virtual experiences. Where applicable, at a minimum, excursions and activities involved should be in accordance with the OPASSE as produced by OPHEA. If students regularly travel to a location as part of their curricular program, for example, Learn to Swim, Family Studies, Design & Technology, and Cooperative Education placements, TDSB excursion forms may not be necessary. However, Parents/Guardians must be informed of dates, location, Supervision and method of travel, for example,



walking, public transportation or private transportation. Graduation ceremonies, school proms, dances off school property and other formal and semi-formal events are not considered to be Excursions for the purpose of this document.

*Excursion and Events Facilities Directory* refers to a TDSB internal directory available exclusively to TDSB staff that identifies approved and not approved excursion and event facility providers.

*Excursion Management Application (“EMA”)* refers to the on-line TDSB excursion management application developed to streamline the generation of excursion forms and approval process for Excursions.

*EMA* refers to the TDSB Excursion Management Application.

*GTA* refers to the Greater Toronto Area

*High-Care Activity* refers to those types of activity(ies) that involve(s) increased risk and/or special safety considerations and may include one or more of the following (but are not limited to):

- potential for adverse weather;
- occur in or on the water (with the exception of timetabled physical education water activities, or outdoor education water activities scheduled by the Centrally Assigned Principal of Outdoor Education, or travel on large water vehicles used for public transportation);
- require special qualifications or certification for Supervision;
- take place away from easy access to first aid;
- overnight; and/or
- travel outside the Greater Toronto Area.

**\*Note: Higher-Risk Sports as listed in the OPASSE as set by the OPHEA.**

Inclusion, as per the Excursions Policy (P033), refers to ensuring that appropriate cultural backgrounds are considered of all students (e.g., reflecting different ways of knowing and being) when planning and carrying out excursions and excursion related activities at TDSB. Excursions and excursion related activities should be welcoming, safe, engaging, and appropriate to the age, maturity.

*Informed Consent* refers to the Parent’s/Guardian’s consent/permission given after all reasonable efforts have been made to fully explain the excursion or the activity and any reasonably foreseeable risks associated with that excursion or activity.

*OPASSE* refers to the Ontario Physical Activity Safety Standards in Education.

*OPHEA* refers to the Ontario Physical and Health Education Association.

*Out-of-Country Excursion* refers to any excursions that involve travel to countries/destinations outside of Canada.

*Parent/Guardian* for the purpose of this document, refers to a biological parent, or a person who has legally adopted a child, or is otherwise deemed by law to have

parental status, or a legal guardian, or any caregiver legally recognized as acting in the place of a parent/legal guardian, who holds decision-making responsibility over a student, **and** is on record with the school as a parent or legal guardian of a student at the school.

*Program Service Provider* for the purpose of this document refers to external organizations, companies and agencies that provide services, programs, activities and/or facilities that are used for Excursions or Excursion-related activities.

*Student Excursion Report* refers to a report generated by Trillium or EMA that lists all the students on the Excursion, their addresses, phone numbers and emergency contacts, along with any health issues in accordance with the TDSB privacy obligations. This report can be generated for a class list or a team/group list.

*Student Tour* refers to Commercial Excursions, lasting more than one day, involving travel and accommodation paid for by students or their Parents/Guardians.

*Supervision* refers to overseeing for the purpose of regulation, direction, or ensuring safety and security of excursion participants.

*TDSB* refers to the Toronto District School Board, which is also referred to as the Board

*Volunteer*, for the purposes of this document, refers to a person who may assist in the Supervision of Excursions and physical education activities. Examples of volunteers may include instructional assistants, educational assistants, retired teachers, cooperative students, Parents/Guardians and teacher candidates. These volunteers will not be the sole supervisors of any Excursions or Excursion-related activities.

#### **4. RESPONSIBILITY**

Associate Director, Leadership, Learning and School Improvement

#### **5. APPLICATION AND SCOPE**

This Procedure applies to all employees, TDSB Trustees, students, occasional staff, Parents/Guardians, Program Service Providers, Volunteers, and TDSB employed or affiliated registered medical/health professionals.

#### **6. PROCEDURES**

This Procedure is divided into sections as indexed below:

##### Section

##### A. Other Considerations

##### A.1 Accommodation of Religious Requirements, Practices, and Observances

- A.2 Physical Education/Interschool Athletics
  - A.3 Virtual Excursions
  - A.4 Other Program Areas
- B. Medical Requirements
- C. Restrictions
- D. Risk/Liability
- E. Minimum Responsibilities
  - E.1 Principals
  - E.2 Teachers
  - E.3 Volunteers
  - E.4 Students
  - E.5 Parents/Guardians
  - E.6 Superintendents of Education
- F. Application and Approval
  - F.1 Excursions within Walking Distance of the School
  - F.2 Series of Scheduled Events or Class Activities
  - F.3 Unauthorized Excursions
  - F.4 Commercial Excursions, Out-of-Country Excursions, and Student Tours
- G. Supervision
  - G.1 Principles of Supervision
  - G.2 General Requirements
  - G.3 Water-based Excursions
  - G.4 Non-Athletic Related Excursions
- H. Waivers
- I. Transportation
  - I.1 Boat and Air Transportation
  - I.2 Use of Buses and Vans
  - I.3 Student Tour Companies
  - I.4 Volunteer Drivers Using Vehicles or Another Licensed Automobile
  - I.4(c) Child Seating and Restraint Systems (Car Seats, Booster Seats, Seatbelts)
  - I.4(d) Seatbelts
  - I.4(e) Student Driver Using Private Vehicle
  - I.4(f) Personal Automobile Insurance Coverage
  - I.5 Educational Staff Renting Vehicles
  - I.6 Educational Staff Using TDSB Vehicles
  - I.7 Student Identification for Transport
  - I.8 Travel in Inclement Weather
  - I.9 Transportation of Excursion-Related Equipment and Supplies
  - I.10 Public Transportation
- J. Excursion Costs
- K. Risk Management
  - K.1 Contingency Planning
  - K.2 Medical and Emergency Procedures
  - K.3 Emergency Communications

- K.4 Early Termination of Excursions
- K.5 Requirements of Program Service Providers

## **A. OTHER CONSIDERATIONS**

### **A.1 Accommodation of Religious Requirements, Practices, and Observances**

- a) TDSB schools and workplaces should make every reasonable effort to be aware of the religious observances of their staff, students, and community when planning special meetings, examination schedules, school concerts, parent interviews, field trips, and other school events or gatherings. These considerations do not apply where it is known that none of the potential participants would observe the particular day in question.
- b) For additional information regarding Holy Days, please consult TDSB Guidelines and Procedures for the Accommodation of Religious Requirements, Practices, and Observances (pages 6 and 7).

### **A.2 Physical Education/Interschool Athletics/Activities**

The appropriate workflow will be completed using EMA to generate the appropriate Parent/Guardian permission for the Excursion. The teacher in charge of the Excursion will follow the specific information as set out by OPHEA in the OPASSE.

### **A.3 Virtual Excursions**

It is assumed that Virtual Excursions will meet the criteria of all other Excursions and will happen within the instructional setting of the class (classroom or on-line platform). The appropriate workflow will be completed using EMA to generate the appropriate Parent/Guardian acknowledgement for the Excursion. The principal, or designate, will approve the curriculum connected experiences, prior to the excursion taking place.

### **A.4 Other Program Areas**

The teacher in charge of the excursion should consult appropriate curriculum and safety documents for requirements specific to other program areas.

## **B. MEDICAL REQUIREMENTS**

- a) At the beginning of the school year, schools should request that Parents/Guardians complete TDSB's medical information form provided either in electronic form/online via EMA or in hard copy (TDSB's Form 511: Medical Information for Excursions). This medical information is collected in accordance with TDSB privacy obligations and entered into Trillium and/or EMA by schools.
- b) During the same school year, it is not necessary for Parents/Guardians to complete another Form 511: Medical Information for Excursions in electronic form/online via EMA or in hard copy, except for an overnight Excursion or if there have been any changes to the student's medical information.
- c) Overnight interschool athletics within the province of Ontario do not require an additional medical information form to be completed by Parents/Guardians. Once

the medical information is entered into Trillium and/or EMA, Trillium or EMA will generate a Student Excursion Report that outlines the student's medical/health information. The generated Student Excursion Report must be generated and carried for each Excursion by the teacher in charge of the Excursion. Parents/Guardians will also have the opportunity to update medical information for their child throughout the school year by completing another Form 511: Medical Information for Excursions (or the appropriate athletics activity form) in hard copy or in electronic form using EMA.

### **C. RESTRICTIONS**

- d) An appropriate and related program, including assessments, will be planned for all students who do not participate in the Excursion. Conversely all students participating in an Excursion will be allowed to complete any assignments or assessments missed due to the Excursion within a reasonable time after the Excursion, without penalty.
- e) The principal will ensure that a sufficient number of teachers and adult supervisors accompany students on all Excursions in accordance with the minimum Supervision ratios outlined in this document (See Section G: Supervision for more information on Supervision ratios). Efforts should be made to include adults or older students who speak the languages of some of the students, especially when newcomers to Canada are among the group (See Section G: Supervision).
- f) Schools and school staff/administration will not authorize any Excursions that do not comply with the requirements outlined in this document and the Excursions Policy (P033). School staff/administration and teachers should not initiate or become involved in Excursions, student activities or events that do not meet the requirements outlined in this document.
- g) No TDSB employee, external organization or Program Service Provider will engage in the distribution of any literature, documents or material on school/TDSB property or use any equipment or TDSB property.
- h) Staff are not to organize, promote or discuss any Excursions that do not comply with the requirements outlined in this document or that have not been formally approved by TDSB.
- i) No TDSB employee will use any forms, literature, or any documents that may indicate to the Parents/Guardians and/or the students that unapproved Excursions have been approved by TDSB
- j) Any teacher, school staff member, principal or his/her designate who becomes aware of an Excursion, activity or event that has not been formally approved by TDSB according to the requirements of this document will make every effort to inform the students involved and their Parents/Guardians of the 'not approved' status of the Excursion, activity or event.

### **D. RISK/LIABILITY**

- a) Excursions involve risks and responsibilities different from those encountered in the classroom.

- b) TDSB's liability insurance policy protects both staff and volunteers who are working within the scope of their duties for TDSB, from third party claims. The insurer responds to lawsuits that are brought against staff or volunteers who are supervising the Excursions, school events and activities approved by the principal, the Superintendent of Education and the Executive Superintendent of Education, where applicable.

## E. MINIMUM RESPONSIBILITIES

### E.1 For Principals (also see Section E.6: Superintendents of Education)

- a) At the beginning of the school year, principals will ensure that:
  - i. A student data verification sheet is distributed to each student. This sheet should be completed and signed by the Parents/Guardians or the adult student (age 18 years or over). Where a student of 16 or 17 has withdrawn from parental control, the student can complete and sign the student data verification sheet. Completed student data verification sheet should be returned to the school and the changes should be entered into Trillium.
  - ii. The completed and signed Form 511: Medical Information for Excursions outlining the student's medical/health information and condition, if any and authorizing the teacher in charge of the Excursion to seek and obtain medical care, if necessary, for the student, has been obtained from the Parents/Guardians. The Parents/Guardians also have an option to either provide or update their child's medical/health information via EMA by completing an online form. **Principals must ensure that the student's medical information provided either electronically via EMA or in hard copy is entered into Trillium.** The entering of this information into Trillium should be a top priority for schools, as this is a health and safety issue.
- b) The student data verification sheet and Form 511: Medical Information for Excursions should be kept and filed (hardcopies) or stored in electronic format.
- c) The principal will make the decision to approve or not approve any Excursion and/or participants, including those requiring additional approval from the Superintendents of Education and the Executive Superintendent of Education, where applicable. External waivers or releases from external organizations or Program Service Providers must be acceptable to the TDSB Legal Services and/or Risk Management Department(s) and approved by the Superintendent of Education and Executive Superintendent of Education, where applicable (See Section E.6: Superintendents of Education). Principals will ensure that school staff and teachers are **only** selecting approved excursion destinations and approved Program Service Providers found in the TDSB Excursion and Event Facilities Directory.
- d) For those Excursions that require the additional approval of the Superintendent of Education, at least one (1) month prior to the Excursion, the principal will submit, as required, documentation necessary for the Superintendent of Education's approval via EMA.



- e) **For overnight Excursions outside of Ontario**, Request for Excursion Approval by the Superintendent of Education (and the Executive Superintendent of Education, where applicable) must be submitted at least three (3) months in advance, and for **Out-of-Country Excursions**, Request for Excursion Approval by the Superintendent of Education and the Executive Superintendent of Education must be submitted at least six (6) months in advance. In order to plan for the necessary approval(s), for those Excursions that require the additional approval, school staff and teachers should draft their Excursion proposal and receive the principal approval first, prior to submitting a formal request for approval to the Superintendent of Education and the Executive Superintendent of Education, where applicable.
- f) The principal or his/her designate identified to the teachers will be available by telephone, cellular telephone, or other wireless means of communication to teachers in charge of the Excursion in case an emergency arises at any time during the Excursion. The principal will keep their mobile phone on them at all times during the Excursion. The phone number (the principal mobile) or contact information for the principal or his/her designate should be kept with the teacher in charge during the Excursion. The Excursion itinerary and phone number(s) for school staff while on the Excursion should be available to the principal and school office during the Excursion.
- g) In accordance with the TDSB Restrictions on Alcohol, Drug and Tobacco Use Policy (P095), all persons attending Excursions are prohibited from being in the possession of, or under the influence of alcohol or drugs (including cannabis) while on TDSB premises or while engaging in TDSB related activities and Excursions. Personal time, such as sightseeing, shopping or other forms of personal entertainment, including the involvement of alcohol or drugs, for staff and volunteers participating in an excursion are not permitted. Family, friends, pets or students from other boards are also not permitted to participate in an excursion.
- h) The principal will designate at least one (1) certified teacher from the school as the teacher in charge of the Excursion. The principal should not designate an occasional teacher as teacher in charge of the Excursion unless the occasional teacher is a long-term occasional teacher, who, in the judgment of the principal, has sufficient knowledge about the students and the nature and activity of the Excursion.
- i) The principal will ensure that a sufficient number of teachers and adult supervisors accompany students on all Excursions, in accordance with the minimum Supervision ratios outlined in this document. Efforts should be made to include adults or older students who speak the languages of some of the students, especially when newcomers to Canada are among the group (See Sections G.2: Supervision, paragraphs (f) and (p) for minimum Supervision ratios.)
- j) The principal will make every effort to ensure that a completed and signed (either online via EMA or in hard copy) Parent/Guardian Permission for Excursion (or appropriate athletics form) is obtained for each student participating in an Excursion.

- k) Once the Excursion has been approved by TDSB, the principal and the teacher(s) in charge of the Excursion should consider holding Parent/Guardian information sessions, except for overnight Excursions where it is mandatory, are planned, to outline the educational purpose, explain risks, address any concerns and answer any questions.
- l) The principal should ensure that all excursion supervisors are aware of relevant medical concerns for all excursion participants.
- m) The principal should ensure that the Excursions reflect the Board's commitments to inclusion and equity and do not limit any students, for example, due to accessibility or financial constraints.
- n) All Volunteers, including volunteer drivers should be approved by the principal prior to the commencement of the Excursion.
- o) The principal will make every effort to inform the Volunteers about their responsibilities and about requirements for insurance as outlined in this document (See Section E.3: For Volunteers). The principal will request that all Volunteers sign a TDSB approved waiver as well as have proof of police background check to participate in an Excursion prior to the commencement of the Excursion.
- p) If the Excursion involves the use of volunteer drivers, these volunteer drivers are required to complete and sign Form 511F: Principal Authorization for Volunteer Drivers. The principal will make the decision to approve or not approve this form/volunteer driver. Principal Authorization for Volunteer Drivers to authorize volunteer drivers and their private vehicles for transportation of students on Excursions. Volunteer drivers should be used in limited situations.
  - i. If the Excursion involves the use of volunteer drivers, the principal should ensure that Form 511: Parent/Guardian Permission for Excursion (or appropriate athletics form) includes specific information about the volunteer drivers and the vehicles being used, and that every effort is made to obtain consent from Parents/Guardians for each Excursion for students to travel in specified private vehicles with specific volunteer drivers. The requirements for volunteer drivers include a valid (unrestricted) Ontario Class G driver's license, a 3-year uncertified driver's record, personal automobile insurance coverage, and a vehicle that is in good working condition. Volunteer drivers must be over 25 years old and show proof of liability insurance on the vehicle of at least \$2,000,000. Every occupant of the vehicle must have appropriate seating and restraints (See Section I.4: Transportation, paragraph (c): Child Seating and Restraint Systems (Car Seats, Booster Seats, Seatbelts). Volunteer drivers may have no more than four 4/7 occupants, including driver, and no pets, in any vehicle. Passenger vans, for example, that could transport 10 or more occupants, are not permitted.
  - ii. Volunteer drivers should not drive themselves or other students to any activity outside of the Excursion.
- q) The principal will ensure that contingency planning is part of every Excursion. A formal contingency plan is part of every High-Care Activity or overnight Excursion



- (except Excursions to TDSB Outdoor Education schools scheduled by the Centrally Assigned Principal of Outdoor Education, and overnight interschool athletics Excursions) and must be approved by the appropriate Superintendent of Education and the Executive Superintendent of Education, where applicable.
- r) Wherever possible, supervisors on an Excursion must carry cellphones and/or two-way radios. Where cellphones and/or two-way radios are the property of the school or TDSB, the principal will make such items available to supervisors on an Excursion. Supervisors must ensure that cellphones and/or two-way radios are in good working condition, and that any batteries are fully charged prior to the Excursion.
  - s) During the Excursion preparations, the principal will consider:
    - i. if a student has a serious medical/health condition;
    - ii. if the excursion destination is compatible for all students;
    - iii. preparations for student abilities, such as swim tests, have been completed;
    - iv. if the administration of medication is too complicated;
    - v. if a student has engaged in serious misconduct, including breach of the Board Code of Conduct (PR585), the school's Code of Behaviour, the Code of Behaviour for Athletes (for interschool athletics), and other applicable TDSB policies and procedures to determine whether a student participates in an Excursion.
  - t) The principal will ensure that one copy of all appropriate approved forms (e.g., all completed and signed Parent/Guardian Permission for Excursion; for interschool athletics, the appropriate athletics forms, including the approved team lists; for physical education class Excursions, the appropriate completed forms; and other forms pertinent to the Excursion) are on file until at least the end of June of the current school year following the school year in which the Excursion takes place.

## **E.2. For Teachers**

- a) The teachers participating in an Excursion must be familiar with the content of the Excursions Policy (P033), this procedure and any associated documents and forms.
- b) The teacher will ensure that each Excursion has an educational purpose with curricular relevance that is clearly identified to the students and their Parents/Guardians.
- c) The teacher will ensure each Excursion is equitable and inclusive. For excursions with high costs per student and/or involving 15 or fewer students out of a pool of students of 20 or more, a teacher must provide an explanation addressing the student participation.
- d) The teacher must complete and submit to the principal via EMA all excursion request(s)/form(s) that require approval by the principal and/or approval by the Superintendent of Education at least one (1) month prior to the scheduled Excursion. Note: In order to plan for the approval, for those Excursions that require

the additional approval, teachers must draft their Excursion proposal and receive the principal approval of the Excursion proposal prior to submitting a formal request for approval to the principal and/or the Superintendent of Education and the Executive Superintendent of Education, where applicable. Where applicable, teachers should select approved excursion destinations found in the TDSB Excursion and Event Facilities Directory. No communication to Parents/Guardians should take place unless approval is first obtained.

- e) All external waivers, releases, acknowledgements, booking or registration forms and other documents/forms provided by Program Service Providers must be approved by TDSB Legal Services and/or Risk Management Department and by the Superintendent of Education.
- f) In accordance with Ontario *Travel Industry Act*, 2002 and Regulation 26/05, overnight Excursions not related to a competition or involving a camp, camping or out tripping, must be arranged through TDSB approved travel agent(s) (retailers) and travel wholesalers (for example, tour operators) registered with the Travel Industry Council of Ontario ("TICO").
- g) Teachers must use only approved excursion vendors in the Excursion and Event Facilities Directory. A Principal and, if required, a Superintendent could make an exception.
- h) The teacher in charge of the Excursion will ensure that contingency planning is part of every Excursion, especially of every High-Care Activity or overnight Excursion (except Excursions to TDSB Outdoor Education schools scheduled by the Centrally Assigned Principal of Outdoor Education, and overnight interschool athletics Excursions) and must be approved by the principal and the Superintendent of Education and the Executive Superintendent of Education, where applicable. Except for tour operator / commercial tours, the teacher must be familiar and have attended the excursion destination previously, for example, for a play, they must have attended that theatre.
  - i. The teacher in charge of the Excursion will ensure, wherever possible, that supervisors on an Excursion will carry copies of the emergency procedures and student information as generated by the Trillium student excursion report or EMA.
  - ii. The teacher in charge of the Excursion will inform the principal of alternate plans for Supervision in case one or more supervisors are unable to attend the Excursion.
  - iii. Only once approval has been obtained, the teacher in charge of the Excursion will make every effort to inform students and their Parents/Guardians, of details of the Excursion, including costs, deposits, refunds, non-refundable costs, behavioural expectations, and any risks associated with the Excursion through either Form 511: Parent/Guardian Permission for Excursion or online via EMA.
  - iv. The teacher in charge of the Excursion, in consultation with the principal, should consider holding Parent/Guardian information sessions when

overnight Excursions are planned by the school, in order to outline the educational purpose, explain risks, and answer any questions.

- v. In exceptional circumstances, Excursion dates and times may change. The teacher will make every effort to inform students and their Parents/Guardians of these changes.
- i) The teacher in charge of the Excursion will make every effort to inform Parents/Guardians in writing through either Form 511: Parent/Guardian Permission for Excursion (or the appropriate athletics form) or online via EMA, of the names of any volunteer drivers participating in the Excursion, and specific information about the volunteer drivers' vehicles.
- j) If the Excursion involves the use of volunteer drivers, the teacher will make every effort to ensure that consent from Parents/Guardians is obtained for each Excursion for students to travel in specified private vehicles with specific volunteer drivers (See Section E.1: For Principals, paragraph n).
- k) The teacher will make every effort to inform Parents/Guardians in writing through either Form 511: Parent/Guardian Permission for Excursion (or the appropriate athletics form) or online via EMA that Parents/Guardians will be responsible for any applicable losses or costs should their child engage in misconduct, including a breach of the Board Code of Conduct (PR585), the school's Code of Behaviour, or the Code of Behaviour for Athletes (for interschool athletics) during the Excursion. This could include costs for transportation home or for damages resulting from their child's misconduct.
- l) Where practical, teachers will provide Parents/Guardians with a cover statement in the student's first language, or the Parent's/Guardian's first language where different, describing the contents and importance of all forms and any other written communication regarding the Excursion. If this is not practical, teachers will provide Parents/Guardians with a standard letter that indicates that the attached forms are important and should be translated.
- m) The teacher in charge of the Excursion will arrange an appropriate and related program, including any assessments, for all students who do not participate in the Excursion. Conversely, all students participating in an Excursion will be allowed to complete any assignments or assessments missed due to the Excursion, within a reasonable time after the Excursion, without penalty.
- n) The teacher in charge of the Excursion must be aware of the details of all medical and emergency care information for all excursion participants prior to any Excursion outlined in the Student Excursion Report.
- o) The teacher in charge of the Excursion must inform all supervisors of relevant medical concerns for all excursion participants and expected interventions.
- p) The teacher in charge of the Excursion must ensure that all excursion participants have the appropriate visa(s), proof of citizenship, passports, Ontario Health Card number, and out-of-country health/accident/travel insurance policy(ies), as required, for each student and staff member for all Out-of-Country Excursions. The teacher in charge of the Excursion will check the Government of Canada Travel

Advice and Advisories website (travel.gc.ca) for specific travel advice for the destination.

- q) For the Excursion purposes, in particular for Excursions outside of Ontario or Out-of-Country Excursions, where a student is subject to a custody order, the consent of both Parents is recommended if there is joint custody. Sometimes both Parents have custody, but they disagree with each other on the child's educational matters. In that case, it is advisable for the school to ask both Parents to reach an agreement first as the school cannot follow the Parents' conflicting directions/instructions.
- r) The teacher in charge of the Excursion will arrange and supervise all aspects of transportation required for the Excursion using TDSB approved vendors, including specialized transportation, when appropriate, for students with special needs.
- s) The teacher in charge of the Excursion will submit, via EMA, to the principal one copy of all appropriate approved forms (e.g. all completed and signed Parent/Guardian Permission for Excursion; for interschool athletics, the appropriate athletics forms, including the approved team lists; for physical education class Excursions, the appropriate completed forms; and other forms pertinent to the Excursion) to be kept on file until at least the end of June of the current school year following the school year in which the Excursion takes place. In the case of a TDSB-organized Excursion, centrally assigned staff will assume the responsibility of the teacher in charge of the Excursion, as approved by the department's immediate supervisor (with the exception of interschool athletics meets/games/championships where teachers assume their normal roles).
- t) The teacher in charge of the Excursion must carry the Student Excursion Report on every Excursion.

### **E.3. For Volunteers**

- a) Volunteers will have signed a waiver prior to the excursion.
- b) Volunteers will adhere to all applicable TDSB policies, procedures, guidelines, protocols and practices, and will work under the Supervision of the principal and teachers from the school or under the central department staff for the duration of all Excursions.
- c) Volunteers will adhere to all applicable TDSB policies and procedures relating to volunteers, including police reference checks and/or vulnerable sector screening (See TDSB Employee Protocol (SR23) regarding police reference checks ((Volunteers section) at <https://www.tdsb.on.ca/Portals/0/Elementary/docs/SupportingYou/SR23.pdf>). Volunteers who accompany students on an overnight or multi-day Excursion for the purpose of assistance with Supervision must have a police reference check and/or vulnerable sector screening. Whenever possible, the principal should maintain a list of "approved" volunteers for Excursion purposes.
- d) Volunteers who agree to transport students in private vehicles for an Excursion are required to complete a Form 511F: Principal Authorization for Volunteer Drivers.

The principal will make the decision to authorize or not authorize the volunteer driver and vehicle.

- e) Volunteer drivers must have the automobile liability insurance, with a minimum limit of a \$2,000,000 coverage and history to transport students for the Excursion (See Section E.1: For Principals, paragraph n).

#### **E.4 For Students**

- a) Teachers will review the information about students' responsibilities on Excursions with students at the beginning of the school year. For interschool athletics, students will also receive a copy of the Code of Behaviour for Athletes found in the respective constitutions.

Students will adhere to the TDSB Caring and Safe Schools Policy (P051), the Board Code of Conduct (PR585), the school's Code of Behaviour, and other applicable TDSB policies and procedures; for interschool athletics, in addition to the above, the Code of Behaviour for Athletes, for the duration of all Excursions. Students who fail to adhere to the TDSB Caring and Safe Schools Policy (P051), the Board Code of Conduct (PR585), the school's Code of Behaviour, the Code of Behaviour for Athletes (for interschool athletics) and other applicable TDSB policies and procedures, while on Excursions, will be subject to the same consequences as if the students were in attendance at school during regular school hours.

- b) While on Excursions, and while travelling to and from Excursions, students will continue to be responsible for their conduct. Students will comply with their obligations under section 23 of Regulation 298 of the *Education Act*, including the following:
  - exercise self-discipline;
  - accept such discipline as would be exercised by a kind, firm, and judicious parent;
  - be courteous and demonstrate inclusiveness and equity toward fellow students;
  - be obedient and courteous to the principal and teachers; and
  - show respect for school property.
- c) Students must adhere to the TDSB Restrictions on Alcohol, Drug and Tobacco Use Policy (P095) that prohibits smoking, vaping, use of alcohol, and the non-medical use of drugs at all school activities and Excursions whether they take place inside school or off school property.
- d) Students participating in Excursions are expected to be prepared for the Excursion and adhere to Excursion expectations.
- e) Students participating in Excursions will follow the directions of teachers in charge of Excursion and other supervisors during the Excursion.

- f) Students participating in Excursions are expected to complete, without penalty, any assignments and assessments missed in any subject due to the Excursion, within a reasonable time after the Excursion, as determined by the student's teachers.

#### **E.5. For Parents/Guardians**

- a) Parents/Guardians of students under the age of 18 who wish their child to participate in an Excursion are required to provide permission for each Excursion by completing Form 511: Parent/Guardian Permission for Excursion (or the appropriate athletics form) either in hard copy or online via EMA. Students aged 18 and over may complete Form 511: Parent/Guardian Permission for Excursion (or the appropriate athletics form) on their own behalf; however, it is strongly recommended that the Parents/Guardians of such students also approve the Excursion.
- b) Form 511: Parent/Guardian Permission for Excursion (or the appropriate athletics form) will contain information about the nature and purpose of the Excursion, any special risks or unusual activities, locations, dates and/or times, supervision, transportation arrangements, including mode of transport, use of volunteer drivers, costs, special clothing or equipment required, lunch or other food requirements, and any other relevant information that could have some bearing on whether the Parents/Guardians (or students aged 18 and over) would give or withhold their permission, need to update relevant medical or emergency information, and/or purchase student accident insurance..
- c) Every effort will be made to advise Parents/Guardians of any volunteer drivers participating in the Excursion and to provide them with specific information about the volunteer drivers' vehicles. Every effort will be made to obtain written Informed Consent from the Parents/Guardians in order for the student to ride with a specific volunteer driver.
- d) Parents/Guardians (or the student, where the student is aged 18 or over) who wish their child to participate in an Excursion are required to indicate if there is any medical/health reason why their child is not able to participate in the Excursion, or that may lead them to require special attention during the Excursion.
- e) At the beginning of the year, Parents/Guardians will complete another Form 511: Medical Information for Excursions authorizing the teacher in charge of the Excursion to seek and obtain medical care for the student, if necessary. Overnight interschool athletics within the province may not require an additional Form 511: Medical Information to be completed. The student's medical information will be requested annually by the school, and Parents/Guardians are expected to provide the school with any relevant information or changes throughout the school year.
- f) Parents/Guardians are expected to ensure that their child is prepared appropriately for the Excursion (e.g., bringing their own lunches and/or other times (if applicable), wear appropriate clothes, etc.)



- g) Parents/Guardian are responsible for any applicable losses or costs should their child engage in misconduct, including a breach of the TDSB Caring and Safe Schools Policy (P051), the Board Code of Conduct (PR585), the school's Code of Behaviour, the Code of Behaviour for Athletes (for interschool athletics) and other applicable TDSB policies and procedures. This could include lost deposit fees, costs for transportation home, or for damages resulting from misconduct.
- h) Parents/Guardians are responsible for the purchase of voluntary student accident insurance if necessary, and where required, mandatory travel insurance that includes cancellation coverage for school labour action.

#### **E.6 For Superintendents of Education**

- a) The Superintendent of Education should make the decision to approve or not approve the following types of Excursions:
  - i. Excursions beyond the City of Toronto and the GTA and out of province;
  - ii. High-Care Activities and those types of activities that involve increased risk and/or special safety considerations.
  - iii. Overnight Excursions (not including Excursions to TDSB Outdoor Education schools scheduled by the Centrally Assigned Principal of Outdoor Education or overnight Excursions for Ontario Federation of School Athletic Associations ("OFSAA") secondary school athletics competitions which will be approved on masse);
  - iv. Excursions involving activities not listed in curricular and related safety documents;
  - v. Excursions on days not identified as instructional days on the approved school year calendar or in the summer;
  - vi. Excursions where Program Service Providers require the Parent/Guardian or the student to sign the Program Service Provider's waiver or release forms. Excursion forms for the Superintendent of Education's approval should be submitted via EMA in accordance with the timelines set out in Sections E.1: For Principals, paragraph e) and E.2: For Teachers, paragraph d).
- b) The department's immediate supervisor/coordinator, the Superintendent of Education and the Executive Superintendent of Education, where applicable will make the decision to approve or not approve TDSB-initiated activities, including interschool athletics events sanctioned by TDSB, and Excursions to TDSB Outdoor Education schools scheduled by the Centrally Assigned Principal of Outdoor Education, and Excursions organized by other Centrally Assigned Coordinators.

#### **F. APPLICATION AND APPROVAL**

- a) The permission from the Parents/Guardians should be obtained for all Excursions (See Section E.5: For Parents, paragraph a). Where permission from

Parents/Guardians cannot be obtained for any reason, the student will be excluded from the Excursion unless the principal, having regard to all the circumstances, determines that it is appropriate to allow the student to participate, has verbal permission from the Parent/Guardian, and the activity is not a High-Care Activity, an Out-of-County Excursion and an Excursion outside the GTA.

- b) The principal will make the decision to approve or not approve an Excursion and participants, including those requiring additional approval from Superintendents of Education and the Executive Superintendent of Education, where applicable. The principal may wish to consult the Superintendent of Education, the Executive Superintendent of Education, where applicable or Centrally Assigned Coordinators before making a final decision or determination.
- c) Approval for TDSB-initiated activities and Excursions, including interschool athletics events sanctioned by TDSB, Excursions to TDSB Outdoor Education schools scheduled by the Centrally Assigned Principal of Outdoor Education, and Excursions organized by other Centrally Assigned Coordinators should meet the requirements of this document, the Excursions Policy (P033), except that the Superintendent of Education's approval comes from the department's immediate supervisor. For these Excursions (with the exception of the interschool athletics games/tournaments/events), the responsibilities of the teachers in charge of the Excursion are assumed by the centrally assigned coordinators approved by the appropriate Superintendent of Education.
- d) If the school requires exception to the approval timelines for Excursions the exceptions to these timelines will be considered on an individual basis at the Superintendent of Education's discretion.
- e) No communication or monies will be collected from the Parents/Guardians or students and paid to Program Service Providers prior to the full approval of the Excursion by the principal and/or Superintendent of Education and the Executive Superintendent of Education, where applicable. For Student Tours, no monies will be paid to tour operators until all necessary approvals of the Excursions have been obtained.
- f) High-Care Activities, and other activities not specifically listed in the curriculum or related safety documents, will be submitted to the Superintendent of Education and the Executive Superintendent of Education, where applicable for approval prior to the school participation in High-Care Activities, and other activities not specifically listed in the curriculum or related safety documents.
- g) Any Excursion or activity that is not approved by the principal as part of the school program will not be promoted or organized during school hours or in association whatsoever with the school or TDSB. The teachers will not initiate or become involved in Excursions or activities that have not received the requisite approvals. Excursions organized by TDSB will comply with the same standards of curricular relevance to particular students' individual programs as those Excursions organized by the school. Where applicable, principals and teachers are strongly encouraged to select approved excursion destinations found in the TDSB Excursion and Event Facilities Directory.



**F.1 Excursions within Walking Distance of the School**

- h) Principals have the option of using the: Form 511H: Walking Excursion Form – Immediate Community, to cover non-high-care curricular activities in instructional time within walking distance of the school. Appropriate supervision will be approved on a case-by-case basis by the principal. Where possible, the teacher in charge of the Excursion within walking distance of the school and principal will notify Parents/Guardians of the activity, location, date, and time through newsletters, Web sites, or notes in school planners/agendas.

**F.2 Series of Scheduled Events or Class Activities within the GTA**

- a) Where the Excursion involves a series of related or repeated events or activities to the same destination or for the same purpose, the teacher in charge of the Excursion will prepare a schedule of activities and obtain a single permission from Parents/Guardians for all related or repeated events or activities of the Excursion.

**F.3 Unauthorized Excursions**

- a) Certain excursion activities will not be approved, as they are deemed to be unsafe because of high or multiple risk factors. Examples of such activities include but are not limited to: white water canoeing; white water rafting; parasailing; parachuting; gliding; hang gliding; bungee jumping; swimming parties at private or non-regulated pools, rivers, or lakes; and hot-air balloon rides.

**F.4 Commercial Excursions, Out-of-Country Excursions, and Student Tours**

- a) For any Commercial Excursions, Out-of-Country Excursions, or Student Tours, the teacher in charge of the Commercial Excursion, Out-of-Country Excursion or Student Tour will complete and submit all requests for approval via EMA at least six (6) months prior to the Excursion.
- b) All Out-of-Country Excursions will require additional approval from the Executive Superintendent of Education. The principal and the teacher in charge of the Excursion will check the Government of Canada Travel Advice and Advisories website ([travel.gc.ca](http://travel.gc.ca)) for specific travel advice for the destination.
- c) The teacher in charge of the Commercial Excursion, Out-of-Country Excursion or Student Tour\_ will report any changes to the excursion plan, including the time or point of departure, destination, or addresses, to the principals and/or the Superintendent of Education and the Executive Superintendent of Education, where applicable, as early as possible, in advance of the Excursion. Teachers should be aware that the Commercial Excursion operator has ultimate responsibility and decision making, including changes to the excursion plan.

- d) Commercial Excursions, Out-of-Country Excursions and Student Tours will be arranged through a TDSB approved travel agent or tour operator duly registered under the Ontario *Travel Industry Act, 2002*.
- e) The teacher in charge of the Commercial Excursion, Out-of-Country Excursion or Student Tour will confirm that the travel agent or travel wholesaler is duly registered under the Ontario *Travel Industry Act, 2002* (Refer to the TDSB Excursion and Event Facilities Directory which contains a listing of all approved tour operators). All travel agents must possess a license issued by the Travel Industry Council of Ontario (TICO).
- f) Staff and students participating in a Commercial Excursion, Out-of-Country Excursion or Student Tour must be covered by an insurance package that includes the following types of insurance (where applicable):
  - i. repatriation;
  - ii. cancellation, including labour action;
  - iii. accidental health; and
  - iv. baggage.

For Commercial Excursions, the provider will include the cost of their insurance in the excursion cost.

- g) Except for unexpected health and unique unexpected family circumstances, such as a death in the family, students will not be able to leave a Commercial Excursion during the excursion or to separately join or leave an excursion once underway, for example, a student may want to take separate transportation to meet their family who is on vacation or leave a vacation destination to join the school excursion. Any additional costs for transportation and supervision will be the responsibility of the student and may be covered under the travel insurance.
- h) Inviting or use of family members or friends as volunteers, or pets by staff, is not permitted. Students must be enrolled at the school at the time of excursion, to participate.
- i) Free time during an excursion is not recommended.
- j) Supervision ratios outlined in this Procedure should be followed on Commercial Excursions. Excess supervision and “free time” for supervisors should be avoided.
- k) When communicating the cost to parents/guardians, the cost of supervision/chaperones should be identified and communicated separately.
- l) Destinations involving beaches and swimming are to be avoided.
- m) Excursions that are initiated for a club performance, competition or game match and have a tour itinerary included, should be using a Commercial Excursion provider
- n) All excursion contracts with tour operators must contain the following clause:  
*“Despite any other agreement, oral or written between the parties, the agent/tour operator will fully refund within 30 days all monies paid for hotel, flight, transportation, deposits, or other services if the principal of the school notifies the*

*agent/tour operator that, in the opinion of Toronto District School Board, it is unsafe for the trip to proceed” unless other instructions are obtained from the Superintendent of Education and the Executive Superintendent of Education, where applicable, in which case the principal will make the students and their Parents/Guardians aware in writing in the Parent/Guardian Permission for Excursion form or online via EMA of the travel agency’s or travel wholesaler’s policy regarding refunds (See the TDSB Excursion and Event Facilities Directory, which contains a listing of tour operators approved by TDSB and their approved agreements).*

- o) In the case where the deposit is non-refundable, Parents/Guardians must agree that TDSB is not liable for the loss of deposit. All cheques for payment of students’ travel costs should be made payable directly to the travel agency or travel wholesaler. Cheques should not be made payable to the teacher, the school, or TDSB.

## **G. SUPERVISION**

### **G.1 Principles of Supervision**

- a) All activities, facilities, and equipment have inherent risks, but the more effectively they are supervised, the safer they become.
- b) Supervisors should be aware of, and incorporate, the three categories of supervision set out in the OPASSE as set by the OPHEA, including:
  - i. **Constant visual:** The supervisor is physically present, watching a single activity.
  - ii. **On-site/In-sight:** The supervisor is present, but not necessarily constantly viewing a single activity.
  - iii. **In-the-area:** The supervisor may be in one area while activity is taking place in another area nearby.
- c) Supervisors of athletics activities will adhere to the designated level of Supervision as stipulated in the OPASSE.
- d) Supervisors should exercise their discretion in determining the appropriate level of during an Excursion, having regard to the following factors, among others:
  - i. the risk level of the activity;
  - ii. nature of the destination and/or travel;
  - iii. safety gear;
  - iv. the participants’ special needs, skill level and abilities; competence and capacity;
  - v. the participants’ ages, maturity and experiences.
- e) Additional Supervision may be advisable where a student’s exceptionality warrants.

- f) The Supervisor will make students aware of the rules and safety considerations of any activities engaged in during the Excursions. Rules may be modified to suit the age, physical abilities and exceptionalities of the students, but once made, they will be strictly enforced. Students participating in the activities are expected to follow the rules for all activities, games, camps and events.
- g) Where appropriate, students and supervisors will receive safety briefings regarding the use of emergency gear and emergency procedures in advance of the Excursion.
- h) The supervisor will be vigilant to prevent students from pressuring each other into trying skills or activities for which they are not ready and/or not able to perform.

## **G.2 General Requirements**

- a) To assist in excursion planning, excursion destinations must be selected from the TDSB Excursion and Event Facility Directory. Any activity or Excursion not listed in the Directory requires the approval of the Superintendent of Education and the Executive Superintendent of Education, where applicable.
- b) When supervising students on Excursions, teachers and other school administration must act as reasonably careful or prudent parents (the common-law standard of care) in these circumstances. In monitoring Excursions, TDSB, its staff, volunteers, authorized agents and representatives or any person permitted to provide Excursions will comply with all statutory duties, including the duty to provide instruction and adequate accommodation for students, and ensure that every activity is conducted in accordance with the *Education Act* and related regulations, *Municipal Freedom of Information and Protection of Privacy Act*, R.S.O. 1990, Chapter M.56, the *Personal Health Information Protection Act*, 2004, S.O. 2004, Chapter 3, Schedule A, the *Child, Youth and Family Services Act*, S.O. 2017, Chapter 14, Sched.1 and other applicable legislation in the province of Ontario as well as TDSB policies and procedures, as may be amended from time to time.
- c) In approving and supervising the Excursions, principals will comply with their statutory duties, including the duty to maintain proper order and discipline in the school, give attention to the health, safety and comfort of the students, supervise instruction in the school, provide for the Supervision of any school activity authorized by TDSB, and report promptly any neglect of duty or infraction of school rules by a student to the Parents/Guardians.
- d) In planning and supervising Excursions, teachers will comply with their statutory duties, including the duty to teach diligently and faithfully the classes or subjects assigned to the teacher by the principal; encourage students in the pursuit of learning; maintain proper order and discipline in the classroom and on the school ground; be responsible for effective instruction, training, and evaluation; ensure that all reasonable safety procedures are carried out; and co-operate with the principal and other teachers to establish and maintain consistent disciplinary practices.

- e) School staff and principals should provide support to students to be able to participate in all Excursions, including activities requiring skills training, such as swimming. For students unable to attend certain Excursions or attend in a limited capacity, alternative activities should be planned, including assessments in accordance with the policies and practices described in the Ontario Ministry of Education policy documents: *Growing Success: Assessment, Evaluation, and Reporting in Ontario Schools – First Edition (Covering Grades 1 to 12), 2010* and *Growing Success – The Kindergarten Addendum: Assessment, Evaluation, and Reporting in Ontario Schools, 2016*.
- f) Excursion volunteers will adhere to the TDSB policies, procedures and guidelines relating to volunteers, including obtaining a police reference check. Volunteers who accompany students on an Excursion for the purpose of assistance with Supervision must have a valid police reference check (See Section E.3: Volunteers, paragraph b).
- g) All overnight Excursions will be supervised by at least two adults, representing the gender of the participating students, including at least one teacher from the school. For Excursions that include students from more than one school, and if it is not practical to have a teacher from each school, one teacher will be designated responsible.
- h) The principal and the teacher in charge of the Excursion will ensure that all precautions for the safety, comfort and supervision of participating students are taken, including an overnight safety plan.
- i) The principal and the teacher in charge of the Excursion will ensure that the following minimum supervision ratios are met for each excursion:

<b>Minimum Supervision Ratios (for a maximum group size of 30 students)</b>		
<b>Grade Levels</b>	<b>Day Excursions</b>	<b>Overnight Excursions</b>
JK–K	Three adult supervisors per group	Not recommended
1–3	Two adult supervisors per group	Not recommended for Grade 1 (Special approval of the Superintendent of Education required for Grades 2 or 3; If approved, four adult supervisors per group)
4–8	Two adult supervisors per group	Two adult supervisors per group
9–12	One adult supervisor per group	Two adult supervisors per group

- j) The Superintendent of Education may grant other exceptions to the supervision ratios and standards at the Superintendent of Education's discretion.
- k) Relevant considerations for the principal or the Superintendent of Education in exercising his or her discretion to increase Supervision ratios, in the chart above

or in the OPASSE as set by the OPHEA, may depend on the following factors (the list is not limited to the below factors):

- i. the nature of certain destinations;
- ii. the nature of the Excursion or activity;
- iii. whether accommodations are required for students with special needs and exceptionalities who will be participating in the Excursion or activity. The accommodations are to be considered so that excursion participants are not disadvantaged or discriminated against during Excursions on the basis of the prohibited grounds of discrimination, as identified in the *Human Rights Code*, R.S.O. 1990, c. H.19, the *Ontarians with Disabilities Act*, 2001, S.O. 2001, c. 32 and the *Accessibility for Ontarians with Disabilities Act*, 2005, S.O. 2005, c. 11 and their respective regulations (See TDSB Accessibility Policy (P069)).
- iv. the competence and capacity of the students involved;
- v. the age of the students;
- vi. whether athletic teams are involved;
- vii. whether Excursions are TDSB initiated and/or involve students from different schools, e.g., Student Environmental Network or a music camp;
- viii. whether Excursions to TDSB Outdoor Education Day Centres where additional Supervision is provided;
- ix. whether the activities require supervisors to have specific training and/or certification in order to supervise and instruct the Excursion or activity. Examples of these Excursions include but are not limited to activities such as canoeing, kayaking, sailing, swimming, Dragonboat racing, wall-ascending lines, bouldering, challenge courses climbing, skiing, snow tubing, camping, horseback riding, and rock climbing (See the OPESG as set by the OPHEA for complete listings and certification requirements).

### **G.3 Excursions Involving Water-Based Activities**

- a) When attending any water-based Excursions, all students must pass the required swim tests as set out by the Ontario Physical Health Education Association (OPHEA) in the Ontario Physical Activity Safety Standards Education (OPASSE).
- b) All Excursions involving water-based activities will only be approved after the principal has reviewed documentation showing that only those students who passed the appropriate test(s) will be participating in water-based activities during the Excursion.
- c) **First Pre-Excursion Swim Test.** All students participating in a pre-Excursion swim test will be given the results of their pre-Excursion swim test. All Parents/Guardians of children taking part in future Excursions that involve swimming, canoeing/kayaking or any other water-based activities will receive their child's/children's pre-Excursion swim test results prior to the Excursion.



Parents/Guardians will know that if their child is going on an Excursion involving water-based activities and if their child has passed a pre-Excursion swim test.

- d) **Second Swim Test.** All students participating in water-based activities must pass a second swim test at a third-party facility. It will be supervised by camp lifeguards and TDSB teachers as per Ontario Camp Association (OCA) guidelines. If students fail the second swim test, they will not participate in any water-based activities during the Excursion. Any student who has failed their second swim test will not be allowed to participate in any water-based activities and will be provided with alternative land-based activities.
- e) All students involved in water-based activities must be wearing a personal floatation device at all times outside designated, supervised, swim areas; no exceptions will be made.
- f) In accordance with the OPHEA requirements, principals and teachers in charge of the Excursion will ensure that the correct number of lifeguards (National Lifeguard Certified) will be present when students are in the water during the Excursion.
- g) All supervisory staff overseeing water-based activities must have current certifications as per Ontario Teachers Aquatic Standard (OTAS). A copy of certification will be provided to the principal prior to the Excursion.

#### **G.4 Non-Athletic Related Excursions**

- a) For non-athletic activities, the principal will ensure that a sufficient number of teachers and adult supervisors accompany students on all Excursions, in accordance with the minimum supervision ratios outlined in this document. (See Section G.2: General Requirements, paragraph j) for minimum Supervision ratios.)
- b) Where the Excursion involves physical education or interschool athletics, the minimum supervision ratios for the specific activity must be obtained from the OPASSE as set by the OPHEA, and the lowest ratio must be adhered to.
- c) The following individuals may be designated by the principal as additional supervisors on an Excursion: principals, vice-principals, teachers, education staff, Parent/Guardian and community volunteers (provided they are 18 years of age or over).
- d) For interschool athletics events, teachers, long-term occasional teachers, principals, and vice-principals employed by the TDSB, and retired TDSB teachers who are in good standing with the Ontario College of Teachers, are eligible to coach, subject to the approval and discretion of the principal.
- e) For overnight excursion, whereby the teacher is adding a tour to the itinerary, refer to Commercial Excursions.
- f) TDSB employees who are not teachers, and individuals who are not employed by the TDSB ("community coaches"), may coach subject to the approval and discretion of the principal, provided community coaches meet criteria for coaching eligibility, are under the direct supervision of a teacher/administrator ("staff

supervisor”) who is employed by the TDSB, obtain police reference checks in accordance with the TDSB Employee Services Protocol: Police Reference Checks (SR23) and adhere to all applicable TDSB policies, procedures and guidelines

## **H. WAIVERS AND ADDITIONAL FORMS**

- a) From time to time, Program Service Providers may require the excursion participants and/or their Parents/Guardians to complete a waiver and/or release forms prior to participating in the Excursions. Where a Program Service Provider requests that a waiver and/or release form or any other forms from a Program Service Provider be completed and signed, the teacher in charge of the Excursion will submit the forms to the Superintendent of Education, prior to the commencement of the Excursion, for his or her approval. Waivers or any other forms from Program Service Providers must be acceptable to the TDSB Legal Services and/or Risk Management Department and approved by the Superintendent of Education prior to the commencement of the Excursion. Principals will ensure that school staff and teachers in charge of the Excursion are selecting approved excursion forms and approved Program Service Providers found in the TDSB Excursion and Event Facilities Directory.

## **I. TRANSPORTATION (Reference to TDSB Transportation of Students Policy (P020))**

- a) Acceptable means of transportation for students participating in Excursions may include:
  - buses and vans owned or hired by the TDSB;
  - public transportation, including vehicles and vessels;
  - authorized, commercial, transportation provider;
  - other forms of transportation approved by the Superintendent of Education.
  - Personal automobile use of volunteer or staff drivers and privately owned vehicles should be a choice of last resort.
- b) Students may make alternate travel arrangements to and from an Excursion with approval from the teacher in charge of the Excursion and prior written permission from the Parents/Guardians.
- c) For public transportation, students should receive full safety briefings from school staff and/or authorized TDSB representatives regarding the use of emergency gear and emergency procedures prior to the Excursion or boarding.
- d) Insurance information will be obtained for vehicles used in the Excursion, regardless of the mode of transportation (i.e., commercial or volunteer).
- e) For volunteer driver’s requirements, see Section E.1: For Principals, paragraph n) and Section E.3: For Volunteers, paragraph d).

### **I.1 Boat and Air Transportation**



- a) For public transportation, both in-country and out of country, commercial boats or ships, vessel inspections are not required. For non-public transportation boats or ships, such as one exclusively offering tours or host a school event, vessel certification is required. In Ontario, refer to the TDSB Excursion and Event Facilities Director for approved Program Service Providers. If the transportation is part of a tour, the tour operator is responsible for confirming the vessel certification and safety plans.
- b) Unless a Program Service Provider is a public transportation provider, for Excursions involving boating activities, all students will require a lifejacket.

### **I.2 Use of Buses and Vans**

- a) The preferred method of transportation for students on Excursions is by buses or vans owned and/or hired, with operator, by the TDSB.
- b) Bus carriers should be selected from the list of pre-approved carriers prepared and issued annually by the TDSB Transportation Department.
- c) A teacher from the school or teacher in charge of the Excursion will supervise students on a bus or van during all school-organized Excursions. The principal may delegate to a team coach or other responsible adult the responsibility of Supervision of students on a bus or van.
- d) In situations where a bus or vehicle owned or hired by the TDSB is used to transport students during an Excursion, the teacher in charge of the Excursion will make and carry a list of the students, along with the Student Excursion Report, on each vehicle. Where possible, the list should include the licence/identification number of each vehicle. Where the activity is an Out-of-Country Excursion, then applicable travel insurance information (including insurers' phone number) should be carried by the teacher in charge of the Excursion.
- e) When the Excursion goes beyond the GTA if travelling by bus, the teacher in charge of the Excursion will also carry a seating plan.

### **I.3 Student Tour Companies**

- a) Student Tour companies must be approved by the TDSB Purchasing Department and if the companies utilize their own carriers, they must meet the TDSB insurance requirements to be considered pre-approved carriers. Tour companies should be instructed to contact the TDSB Purchasing Department for the most recent TDSB insurance requirements.

### **I.4 Volunteer Drivers Using Vehicles or Another Licensed Automobile**

- a) Volunteer drivers are individuals, authorized by the principal, who have agreed to transport students using their own or another licensed automobile that meets the requirements of the TDSB, as outlined on the Form 511F: Principal Authorization

for Volunteer Drivers (See Section E.1: For Principals, paragraph n) and Section E.3: For Volunteers, paragraph d). The teacher in charge of the Excursion is expected to ensure that these forms are completed by volunteer drivers and submitted to the principal for review.

b) **Child Seating and Restraint Systems (Car Seats, Booster Seats and Seatbelts)**

i. Child seating and restraint systems are mandatory as follows when transportation is not by public transportation:

- Child Car Seats (forward-facing) are to be used for children weighing between 9 and 18 kg (20 to 40 lbs).
- Booster Seats are to be used for children weighing from 18 to 36 kg (40 to 80 lbs), less than 145 cm (4 feet, 9 inches) tall and up to 8 years old. Booster seats must be used with both the lap and shoulder belt combination.
- Seatbelts are designed for adults and older children. *Highway Traffic Act*, R.S.O. 1990, c. H.8 allows a child to use a seatbelt alone when any one of the following occurs: (1) child turns 8 years old, or (2) child weighs 36 kg (80 lb.), or (3) child is 145 cm (4 ft. 9 in.) tall or more.

ii. Drivers can be punished for not using proper child car restraints in vehicles. The principals and drivers are responsible for ensuring passengers under age sixteen (16) are properly secured. Principals should not authorize volunteer drivers to transport students unless each student has the appropriate child seating. Where this is not possible, alternative transportation such as public transportation or school bus should be used.

iii. The Ontario government introduced Bill 73, *Highway Traffic Statute Law Amendment Act (Child and Youth Safety) 2004*, which was passed into law on December 9, 2004 and went into effect on September 1, 2005. Bill 73 requires the mandatory and proper use of child car restraints – including car seats and booster seats. In Ontario, all drivers (including visiting drivers) must ensure that children under the age of 16 occupy a seating position and wear the seatbelt assembly, and that children under the age of 8 are properly secured in the correct child car seat or booster seat according to Ontario's requirements (Ontario Ministry of Transportation website at <http://www.mto.gov.on.ca/english/safety/choose-car-seat.shtml>).

c) Volunteer drivers and TDSB employees who use their personal vehicles for transporting students to Excursions and school activities should advise their insurance carrier of these uses of their vehicles. Ontario legislation makes automobile insurance compulsory in the Province of Ontario. Volunteer drivers should have the current motor vehicle liability insurance coverage, with a limited on liability of at least \$1 million on any vehicle used to transport students for the Excursion (See Section E.1: For Principals, paragraph n) and Section E.3: For Volunteers, paragraph d) for more details).

- d) Ontario legislation makes the owner's insurance primary coverage in the event of an accident, in other words, the insurance carried on the vehicle responds first. If a vehicle that is not owned by TDSB is being operated by a volunteer or any other TDSB employee for approved school activities or Excursions, the TDSB non-owned automobile insurance endorsement will respond to third-party liability claims in excess of the owner's insurance limit up to a total combined limit as stated in the TDSB non-owned auto policy.
- e) There is no coverage provided by the TDSB's insurance for damage to a volunteer's or employee's vehicle while they are being operated for TDSB activities.

#### **I.5 Educational Staff Renting Vehicles**

- a) Vehicles being rented by educational staff for Excursions will be rented in the name of the TDSB and only as a last resort.
- b) The full insurance coverage offered by the rental company is to be purchased, including the motor vehicle liability, with a limited on liability of at least \$2,000,000.
- c) The driver will provide proof of a licence required to operate the specified vehicle rented.
- d) Booster Seats. Section I.4 (c) above also applies to educational staff renting vehicles.

#### **I.6 Educational Staff Using TDSB Vehicles**

- a) The driver will provide proof of a licence required to operate the specified vehicle being used and have three-year automobile accident free history.
- b) Booster Seats. Section I.4 (c) above also applies to educational staff using TDSB vehicles.

#### **I.7 Student Identification for Transport**

- a) All students are expected to carry with them identification, including home, emergency, and school telephone numbers. When travelling on public transit, students in Grades K–6 should also carry the address of the excursion venue and the correct transit stop.
- b) In situations where a bus or vehicle owned or hired by the TDSB is used to transport students during an Excursion, the teacher in charge of the Excursion will make and carry a list of the students along with the Student Excursion Report on each vehicle. Where possible, the list should include the licence/identification number of each vehicle. Where the Excursion is out-of-province or includes High-Care Activities, then applicable health information (including insurers' phone number) should also be carried.

- c) When the Excursion goes beyond the GTA if travelling by bus, the teacher in charge of the Excursion will also carry a seating plan.
- d) The principal will retain a copy of the above-mentioned lists as well as other related excursion forms in hard copy or in digital format in the school. The teacher in charge of the Excursion will also carry a copy of these lists. Finally, the supervisor of each bus or vehicle unit will carry a copy of these lists.

#### **I.8 Travel in Inclement Weather**

- a) From time to time, weather conditions may make travel hazardous, particularly on the highway.
- b) The principal has the ultimate responsibility for the safety of the students and will make a decision in these circumstances whether to proceed or not proceed with the Excursion.
- c) The school will cover any costs associated with the cancellation or delay of the Excursion.

#### **I.9 Transportation of Excursion-Related Equipment and Supplies**

- a) The transportation of Excursion-related equipment and supplies will be done in accordance with the safety requirements of the approved carrier.

#### **I.10 Public Transportation**

- a) Public transportation may be an acceptable alternative to a TDSB bus.
- b) Student groups larger than 35–40 should stagger their travel times or make alternative travel arrangements.
- c) If the student group includes students who do not have public transportation student identification cards, the teacher in charge should contact the service provider to obtain a group identification card for the Excursion, if available.
- d) When public transportation services are used, an adult supervisor will travel with all students, K–8 inclusive, to the excursion location, and return to the school. Students in Grades 7 and 8 may be dismissed from the venue, or the appropriate public transportation stop, provided prior written informed consent from their Parents/Guardians has been obtained.
- e) When public transportation services are used, students in Grades 9-12 may travel to and from the excursion venue without adult supervision provided prior written informed consent from their Parents/Guardian has been obtained.
- f) Principals will make individual assessments of the students to ensure that travel arrangements are appropriate in any given circumstance.

**J. EXCURSION COSTS**

- a) In accordance with principles of the Equity Policy (P037) and TDSB's commitments to equity, inclusion, fairness, diversity and acceptance, every effort will be made to ensure that excursion opportunities are communicated in multiple, accessible formats and that students are provided with equitable access to excursion opportunities.
- b) No monies for Excursions will be collected and paid to Program Service Providers before the full approval of the principal and/or approval the Superintendent of Education and the Executive Superintendent of Education, where applicable are obtained.
- c) Teachers in charge of the Excursion will inform Parents/Guardians of the cost of the Excursion and other financial arrangements in the Parent/Guardian Permission for Excursion form. For out-of-province and Out-of-Country Excursions, teachers in charge of the Excursion will also inform Parents/Guardian of detailed costs, deposits, refunds, and non-refundable costs associated with the Excursion.
- d) Principals will inform Parents/Guardians that Parents/Guardians will be responsible for any applicable losses or costs associated with their child being engaged in misconduct while on the Excursion, including damages and/or return transportation fare. Principals will also inform Parents/Guardians that Parents/Guardians will be responsible for any non-refundable deposit associated with the activity should TDSB cancel the Excursion in the interest of student safety or for any other emergency.
- e) Supervision costs may be paid by Parents/Guardians/students up to the required ratios of Supervision (See section G.2 paragraph j). Above the required ratio of supervision, additional costs will be shared by all participating staff.

**K. RISK MANAGEMENT**

In referencing and selecting Program Service Providers from the TDSB Excursion and Event Facilities Directory, school staff will have access to approved vendors and related risk management information.

**K.1 Contingency Planning**

The principal will ensure that contingency planning is part of every Excursion. This includes anticipated risks, potential emergencies, and response to these emergencies.

- a) The principal and the teacher in charge of the Excursion will ensure that an appropriate formal contingency plan is part of every High-Care Activity or overnight Excursion (except excursions to TDSB Outdoor Education schools scheduled by the Centrally Assigned Principal of Outdoor Education, and overnight interschool athletics Excursions).

- b) All excursion destinations in the Excursion and Event Facility's Directory have safety plan. Appropriate contingency plans should include the excursion destination plan as well as consider the degree of isolation of the Excursion. An appropriate contingency plan should include the recognition of potential emergencies, training and preparation, security plans for overnight accommodations, response during the emergency, and communication plans. An appropriate contingency plan should ensure that those individuals supervising the Excursion are familiar with relevant TDSB policies and procedures and other applicable policies, procedures and protocols.
- c) During an emergency, the supervisor will take care of the immediate needs of the participants involved in the incident, prevent the situation from escalating, and follow the steps below:
  - i. Assess the situation to determine if immediate medical care is required or if assistance is required.
  - ii. Account for all participants and remove participants from further danger. A supervisor will take charge of the group, provide comfort and necessary information to all involved.
  - iii. Call 911 or necessary emergency services for assistance, depending on area/location.
  - iv. Arrange for the administration of first aid or CPR as required.
  - v. Call the school emergency contact. Contingency planning should be coordinated with the school emergency coordinator.
  - vi. In life-threatening situations, call the school contingency contact after alerting emergency services.
- d) Staff member or adult supervisor should accompany injured participant to the hospital. Contact principal from hospital and update on the participant's condition.
- e) The principal will arrange a convenient meeting area for Parents/Guardians when an emergency arises, to allow for privacy, fact finding, and exchange of information.
- f) During an emergency, where possible, the teacher in charge of the Excursion will keep or arrange for an ongoing written log of events and times to be kept.

## **K.2 Medical and Emergency Procedures**

- a) At the beginning of the school year, principals will ensure that Form 511: Medical Information for Excursions has been obtained from all Parents/Guardians, authorizing the teacher in charge of the Excursion to seek and obtain medical care, if necessary, for the student (See Section E.5 For Parents/Guardians, paragraph e) for more details).
- b) Students may attend school and school-based Excursions, even if they do not have health coverage. Principals should consider the following in terms of health coverage requirements:



- i. Individuals who were born in Canada and reside in Ontario have universal access to the Ontario Health Insurance Plan (OHIP).
  - ii. Permanent residents (formerly referred to as landed immigrants) obtain OHIP coverage beginning 90 days after entry to Canada.
  - iii. Refugee claimants who are in possession of the Immigration, Refugees and Citizenship Canada Form IMM1442 (Determination of Eligibility for refugee status or Refugee Protection Claimant Document), are provided with the Federal Health Insurance Plan.
  - iv. Temporary residents such as diplomats or guest workers do not have access to health coverage. Private health insurance must be purchased in order to have medical coverage.
  - v. Where students do not have health coverage and an incident happens at school, Ontario School Boards' Insurance Exchange (OSBIE) will reimburse Parents/Guardians for ambulance costs and the first day of emergency care at a hospital. Parents/Guardians must present a paid invoice for these services to the principal. The invoice and copy of the incident report are forwarded to OSBIE.
  - vi. Visa students have private health coverage as part of their tuition fee to the TDSB.
  - vii. For families who remain in Canada after their refugee claim is rejected, or families who have been in the country without status, do not have health insurance. Private health insurance would be the only form of coverage that they can access.
- c) All students may purchase student accident insurance, provided they are covered under OHIP. Principals are advised to ensure that:
- i. a Plan of Care has been developed and shared and reviewed with staff and supervisors of the Excursion when required.
  - ii. Parents/Guardians or students aged 18 or over are advised to purchase private health care insurance if they are not covered by OHIP.
- d) For Out-of-Country Excursions, all students must purchase travel insurance, including cancellation and medical coverage. All Supervisors, except if working for the Board, must purchase travel insurance, including cancellation and medical coverage. Board staff should purchase cancellation coverage at the time of booking. will have hospital and medical insurance coverage for outside Canada during the Excursion.
- e) Teacher(s) in charge of the Excursion and adult supervisors will carry the Student Excursion Report on every Excursion.

### **K.3 Emergency Communications**

- a) In advance of the Excursion, the teacher in charge of the Excursion will leave an itinerary of the Excursion in the school office, including contact information so that

the Principal or designate may contact the teacher in charge of the Excursion if an emergency arises.

- b) The principal or his/her designate identified to the teacher(s) in charge of the Excursion will be available by telephone, cellular telephone, or other wireless means of communication to teacher(s) in charge of the Excursion in case an emergency arises at any time during the Excursion, or if a return is delayed, or any other matters that require the principal's assistance.
- c) Wherever possible, Supervisors will carry cellphones and/or two-way radios. Where cellphones and/or two-way radios are the property of the school, the principal will make such items available to Supervisors. Supervisors must ensure that cellphones and/or two-way radios are in good working condition, and any batteries are fully charged prior to the Excursion.

#### **K.4 Early Termination of Excursions**

- a) In the event that the principal or teacher in charge of the Excursion determines that a student or students should return home prior to the end of the Excursion, the principal or teacher in charge of the Excursion will inform the Parents/Guardians and make suitable and safe arrangements for the return of the student(s).

#### **K.5 Requirements of Program Service Providers**

- a) When utilizing a Program Service Provider, the teacher in charge of the Excursion will determine that the Program Service Provider carries general liability insurance by obtaining a copy of the policy or certificate of insurance.
- b) The teacher in charge will ensure that Program Service Providers have qualified and/or certified instructors, where necessary. Specific qualification and certification requirements for certain activities are set out the OPHEA in the OPASSE.

### **7. EVALUATION**

This procedure will be reviewed as required, but at a minimum every four (4) years after the effective date.

### **8. APPENDICES**

Appendix A: EMA Workflow Summary  
 Appendix B: Emergency Procedures Checklist: Accident  
 Appendix C: Emergency Procedures Checklist: Missing Student  
 Appendix D: 511F: Volunteer Driver Form  
 Appendix E: 511H: Walking Excursion – Immediate Community

### **9. REFERENCE DOCUMENTS**

#### **TDSB Policies:**



- Equity Policy (P037)
- Excursions Policy (P033)
- Restrictions on Alcohol, Drug and Tobacco Use Policy (P095)
- Student Health Support Policy (P092)
- Transportation of Students Policy (P020)
- Caring and Safe Schools Policy (P051)

#### **TDSB Operational Procedures:**

- Anaphylaxis in Schools Procedure (PR563)
- Asthma Management Procedure (PR714)
- Board Code of Conduct (PR585)
- Concussions Management Procedure (PR712)
- Diabetes Management Procedure (PR607)
- Medication Procedure (PR536)
- Transportation of Students Procedure (PR504)

#### **Legislative Acts, Regulations and Government Policies:**

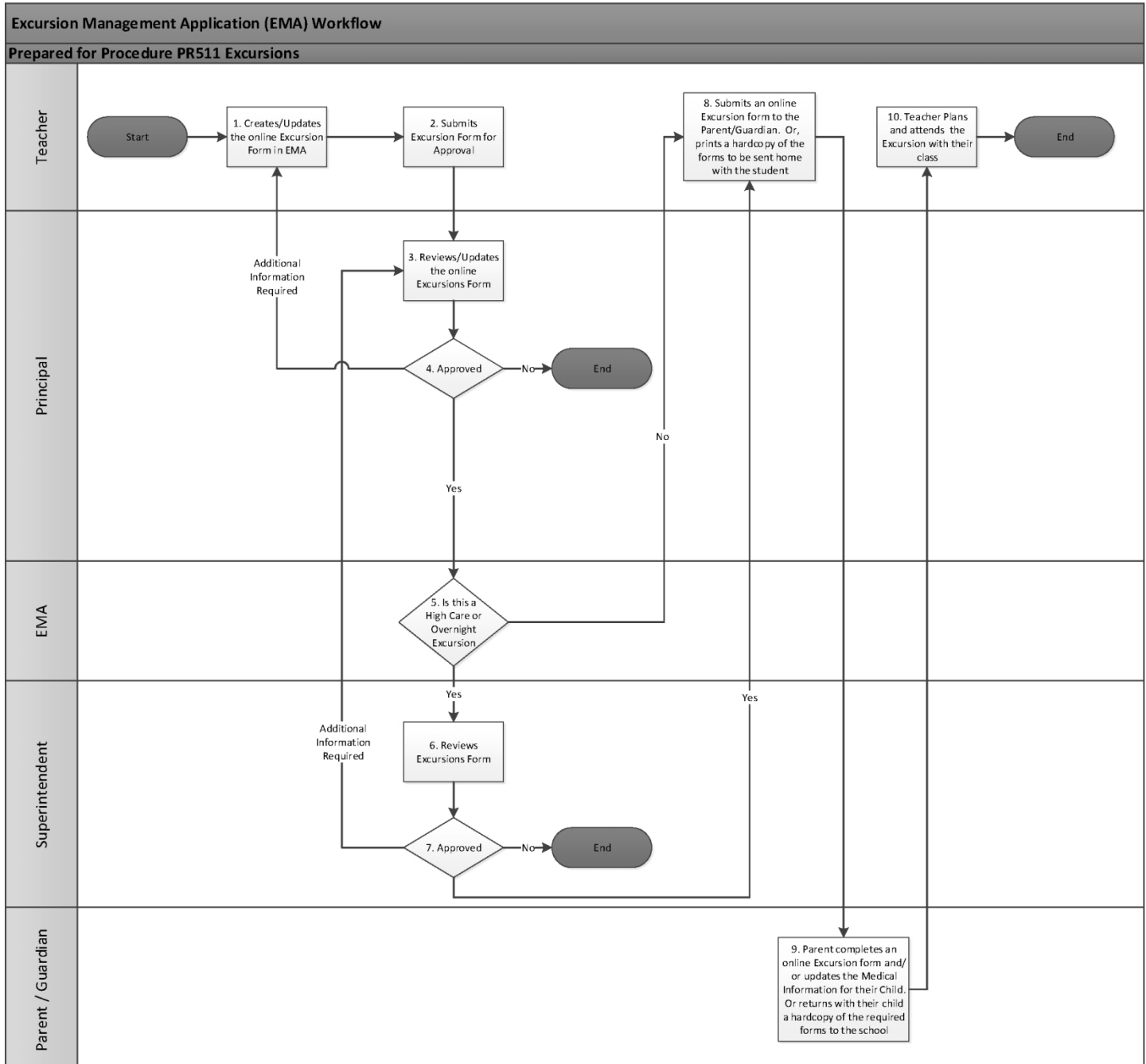
- *Education Act*, R.S.O. 1990, c. E.2
- *Regulation 298: Operation of Schools under Education Act*, R.S.O. 1990, c. E.2
- *Municipal Freedom of Information and Protection of Privacy Act*, R.S.O. 1990, Chapter M.56.
- *Personal Health Information Protection Act*, 2004, S.O. 2004, Chapter 3, Schedule A.
- *Child, Youth and Family Services Act*, S.O. 2017, Chapter 14, Sched.1.
- Policy/Program Memorandum No. 161: Supporting Children and Students with Prevalent Medical Conditions (Anaphylaxis, Diabetes, and/or Epilepsy) in Schools (Ontario Ministry of Education).

#### **Other Related Documents:**

- Ontario Health and Physical Education Association: Ontario Physical Activity Safety Standards in Education
- Growing Success: Assessment, Evaluation, and Reporting in Ontario Schools – First Edition (Covering Grades 1 to 12), 2010 (Ontario Ministry of Education)
- Growing Success – The Kindergarten Addendum: Assessment, Evaluation, and Reporting in Ontario Schools, 2016 (Ontario Ministry of Education)
- TDSB Excursion and Event Facility Directory
- TDSB Guidelines and Procedures for the Accommodation of Religious Requirements, Practices, and Observances, 2010.
- TDSB Employee Services Protocol: Police Reference Checks (SR23).

Appendix A

Excursion Management Application (EMA) Workflow



### EMERGENCY PROCEDURES CHECKLIST ACCIDENT

SEQUENCE	ACTION PLAN	RESPONSIBILITY	PLANNING NOTES
1	Account for all participants. Remove participants from further danger. Provide comfort and maintain Supervision	Teacher in charge of the Excursion	
2	Assess the situation. Determine if immediate medical care or assistance is required.	Teacher in charge of the Excursion	
3	Call 911. Administer first aid or CPR as required.  Do not move victim if: <ul style="list-style-type: none"> <li>• unconscious</li> <li>• neck or back injury</li> <li>• significant loss of blood</li> </ul>	Teacher in charge of the Excursion	
4	Call school emergency contact. Review contingency plan.	Teacher in charge of the Excursion	
5	Inform Parent(s)/Guardian(s).	Principal	
6	Transport injured participant(s) to medical care as quickly as possible	Teacher in charge of the Excursion	
7	Send staff member or adult supervisor to hospital with injured participant(s). Contact principal from hospital with an update.	Teacher in charge of the Excursion	
8	Update principal.	Teacher in charge of the Excursion	
9	Keep ongoing written log of events and times when possible.	Teacher in charge of the Excursion	

\*Teacher in charge of the Excursion can delegate tasks 2, 6, 7, and 9 to the supervisor(s)

#### Considerations in reporting an emergency:

- State name of school/site.
- State name of caller.
- Describe the nature of the problem.

- Give telephone number where emergency is.
- Describe type and extent of injury(ies).
- How many participants are injured.
- Describe the action(s) and steps taken.
- Specify needs (i.e., medical, transportation, supervision).

**EMERGENCY PROCEDURES CHECKLIST  
MISSING STUDENT**

<b>SEQUENCE</b>	<b>ACTION PLAN</b>	<b>RESPONSIBILITY</b>	<b>PLANNING NOTES</b>
1	Inform the teacher in charge of the Excursion immediately.	Other supervisor	
2	Initiate search using only known adults. Do not leave other students unsupervised.	Teacher in charge of the Excursion	
3	Inform the principal (or his/her designate) if student not found within 30 minutes of reported missing. Keep the principal informed of any new developments.	Teacher in charge of the Excursion	
4	Inform local police.	Teacher in charge of the Excursion	
5	Await arrival of police before arranging the return of other students to school (or residence/dormitory).	Teacher in charge of the Excursion	
6	Inform Parent/Guardian.	Principal	
7	Inform supervisory officer (e.g. Superintendent of Education).	Principal	
8	Deal with media.	Principal	
9	Other students must be returned to pre-arranged location within one hour of designated return time.	Principal	
10	Teacher in charge of the Excursion must remain to provide information when police arrive.	Teacher in charge of the Excursion	

# 511F: VOLUNTEER DRIVER FORM



Form 511F  
May 9, 2005  
Page 1 of 2

## Principal Authorization for Volunteer Drivers

The collection and retention of the information requested on this form is authorized and governed by the Ontario Education Act and the Municipal Freedom of Information and Protection of Privacy Act.

This will authorize \_\_\_\_\_  
(Name of teacher or other volunteer driver)

to transport students participating in the following school excursion: \_\_\_\_\_

## Driver Authorization

*This form must be signed both by the owner of the vehicle and by the driver.*

### 1. Declaration to be signed by the owner of the vehicle

Vehicle Information: Make/Model \_\_\_\_\_ Year \_\_\_\_\_ Licence \_\_\_\_\_

I declare that I have authorized \_\_\_\_\_ to drive my vehicle to transport students participating in the school event(s) listed on this form. She/he holds an unrestricted Class G2 or better driver's licence and is licensed to drive in Ontario, and is insured as an operator under a valid automobile liability insurance policy as required by Ontario law.

I declare that the vehicle described above is mechanically fit, there are seat belts in working condition for all passengers, and that the appropriate car/booster seats are used.

I agree to inform the school of any changes in the vehicle or driver information.

Name of owner \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_  
(Please print)

### 2. Declaration to be signed by driver

I declare that I hold an unrestricted driver's Class G2 or better licence and am licensed to drive in Ontario, and that my vehicle is insured by a valid automobile liability insurance policy as required by Ontario law.

I agree to inform the school of any changes in the vehicle or driver information.

Name of driver \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

### 3. Declaration to be signed by parent(s)/guardian(s), if driver is a student

I declare that my daughter/son has my permission to be a volunteer driver for students participating in the school excursion(s) listed on this form. I further declare that my daughter/son holds an unrestricted Class G2 or better driver's licence and is licensed to drive in Ontario, and is insured as an operator under a valid automobile liability insurance policy as required by Ontario law.

Name of parent/guardian \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

G02(C:\Users\090960\Desktop\Excursion Documents\511F.doc)sec.1530



Form 511F  
May 9, 2005  
Page 2 of 2

### Principal Authorization

*The Principal shall request to see original documents where possession of such documents is to be shown.*

All "Trip Drivers," including volunteer drivers, are advised that, in order to bring into effect the Toronto District School Board's (TDSB) Excess Liability Insurance, they must:

- ☐ have a booster seat for each child under the age of 8 or between 18-36 Kg and a standing height less than 145 cm;
- ☐ use a licensed automobile that carries valid automobile third-party liability insurance as required under Ontario legislation;
- ☐ provide the TDSB with prompt written notice, with particulars, of any accident arising out of the use of a licensed automobile during an excursion on TDSB-related business;
- ☐ be aware that the TDSB's Excess Automobile Liability insurance comes into effect only after the vehicle owner's insurance has been exhausted;
- ☐ be aware that any damage to the volunteer's vehicle, the cost of any insurance deductible, or premium adjustment as the result of an accident while the vehicle is being used on Board-related business, is NOT covered by the TDSB's Excess Automobile Liability insurance;
- ☐ carry a minimum of \$1 million of third-party automobile liability insurance (as recommended by the Board).

**Note:** A "Trip Driver" is defined as any person authorized by the TDSB who has agreed to be a driver for a certain excursion while he/she is driving their own or another licensed automobile, to include trustees, employees, teachers, students, parents, volunteers and officials of the TDSB.

School Name \_\_\_\_\_ Date \_\_\_\_\_

Principal's Name \_\_\_\_\_

Signature \_\_\_\_\_

\*For office use only

Distribution (after final approval): Driver \_\_\_\_\_ Principal \_\_\_\_\_

G02(C:\Users\090960\Desktop\Excursion Documents\511F.doc)sec.1530

**511H: WALKING EXCURSION – IMMEDIATE COMMUNITY**

Form 511H  
Aug. 30, 2004  
Page 1 of 1

**Walking Excursion Form – Immediate Community**

School: \_\_\_\_\_ Teacher: \_\_\_\_\_

Principal: \_\_\_\_\_ Principal Signature: \_\_\_\_\_

**Dear Parent/Guardian:**

From time to time, students are engaged in non-high-care curricular activities that occur off school property in the immediate community, but within walking distance of the school. Some examples of these activities are walking to the library, the local park, and the local store.

**School-Specific Activities:**


---



---



---

The principal will approve these excursions, and teacher supervision will be provided at all times.

Whenever possible, parents/guardians will be notified in advance by one or more of the following methods:

- school newsletter,
- class newsletter,
- a note in the student planner/agenda,
- the school Web site.

-----  
Please sign and return the bottom section of the page.

**PERMISSION FOR WALKING EXCURSION – IMMEDIATE COMMUNITY**

Student Name: \_\_\_\_\_

Teacher: \_\_\_\_\_

In signing this form, I give permission for my child, \_\_\_\_\_, to participate in those school-specific curricular activities that occur off school property in the immediate community and within walking distance of the school.

Name of Parent/Guardian: \_\_\_\_\_ (*print*)

Signature of Parent/Guardian: \_\_\_\_\_ Date: \_\_\_\_\_

G02(C:\Users\090960\Desktop\Excursion Documents\511H.doc)sec.1530



## Appendix B

### Ministry of Education Final Report Review and Assessment of Ontario School Board Policies and Procedures on Outdoor Ed/Excursions Involving Water-Related Activities

**Ministry of Education**

Deputy Minister

Mowat Block  
Queen's Park  
Toronto ON M7A 1L2

**Ministère de l'Éducation**

Sous-ministre

Édifice Mowat  
Queen's Park  
Toronto ON M7A 1L2



**Memorandum To:** Directors of Education  
Supervisory Officers of School Authorities  
Executive Director, Provincial and Demonstration Schools Branch

**From:** Bruce Rodrigues  
Deputy Minister

**Date:** May 1, 2018

**Subject:** Final Report – Review and assessment of Ontario school board policies and procedures on outdoor education/excursions involving water-related activities

I am writing to update you on the third party review of school board policies and procedures for safety during outdoor education excursions involving water-related activities. Thank you for your participation in the review. Deloitte Inc. (Deloitte) relayed that they encountered overwhelming support from you and your staff during their data collection, and that the passion and dedication of school board staff for delivering safe outdoor education opportunities to students was evident throughout the review process.

Deloitte has completed its work for the ministry and has submitted a final report. The Executive Summary of this report and a presentation on the findings and recommendations are attached. The full report will be sent to you once it has been translated by the end of May.

As you know, this review was initiated in response to the tragic death of a student during an excursion in Algonquin Park in July 2017. The purpose of the review was to determine:

- whether school boards have policies and procedures in place that meet the minimum standards for risk management during outdoor education/excursions with water-related activities; and
- how school boards monitor implementation and ensure compliance with existing policies and procedures.

.../2

-2-

The report outlines that the majority of school boards that responded to Deloitte's online survey have policies and/or procedures in place. I would like to emphasize that the ministry's expectation is for all school boards to ensure that they have outdoor education/excursion policies and/or procedures in place that meet or exceed the minimum standards laid out in the Ontario Physical Education Safety Guidelines managed by Ophea.

We also expect that boards are reviewing and updating these policies and/or procedures regularly. I urge you to review your existing policies and procedures in light of this report and consider whether any enhancements are needed, for example to include considerations related to the diversity of your board's student population.

As a critical part of this review, please consider opportunities to further support board and school staff with the implementation of policies and/or procedures, including the need to strengthen monitoring and compliance activities.

### **Next Steps**

The Ministry of Education accepts the recommendations in the Deloitte report and is committed to addressing them collaboratively with our school boards and other partners. For instance, the report's findings indicate there is a desire for greater training, guidance, and resources for school boards and schools. In response, the ministry will develop or enhance training modules related to safety during outdoor education/excursions, explore opportunities for more centralized online hosting of resources related to outdoor education/excursions, and facilitate a community of practice to support ongoing information sharing between school boards. We will engage with school boards in the coming months to further discuss a detailed plan to respond to the recommendations.

We recognize the need for cooperation across the sector as we work to address these recommendations and prioritize student safety during all curriculum-linked learning experiences, including outdoor excursions. Where possible, we will leverage existing opportunities and align efforts related to student injury prevention to enhance a culture of safety-mindedness for everyone in the school environment. Further actions may be identified when the Ontario Provincial Police and Coroner investigations into the incident last summer are complete.

### **Webinar**

As an immediate step, the Safe and Healthy Schools, Program Implementation, and French-Language Teaching and Learning branches are offering a series of webinars to discuss the funding model and reporting tool for outdoor education. We will also solicit initial feedback to help us prioritize the types of resources and/or training modules related to safety during outdoor education/excursions that would be most useful for boards.

.../3

-3-

Outdoor education leads in English-language boards can join one of the following two webinars:

- May 7<sup>th</sup> from 1:00pm – 3:00pm.
- May 8<sup>th</sup> from 10:00am – 12:00pm.

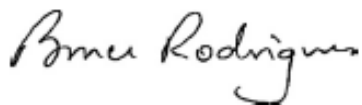
Outdoor education leads in French-language boards can join the following webinar:

- May 8<sup>th</sup> from 1:00pm – 3:00pm.

Details on the webinars and registration will be sent to your board's outdoor education lead in the coming days.

We look forward to working together as we address the recommendations to support the delivery of safe outdoor education opportunities for all students.

If you have any questions about the report or next steps, please contact Debbie Thompson, Director of the Safe and Healthy Schools Branch, at [debbie.thompson@ontario.ca](mailto:debbie.thompson@ontario.ca) or (416) 325-7645.



Bruce Rodrigues  
Deputy Minister

Attachments:

- Executive Summary of Deloitte Report
- PowerPoint Slide Presentation prepared by Deloitte

c: Denise Dwyer, Assistant Deputy Minister, Indigenous Education and Well-Being Division  
Denys Giguère, Assistant Deputy Minister, French-Language Teaching, Learning and Achievement Division  
Martyn Beckett, Assistant Deputy Minister, Student Achievement Division  
Debra Cormier, Director, Field Services Branch  
Council of Ontario Directors of Education

## Ministry of Education Final Report Review and Assessment of Ontario School Board Policies and Procedures on Outdoor Ed/Excursions Involving Water-Related Activities

Ministry of Education

Deputy Minister

Mowat Block  
Queen's Park  
Toronto ON M7A 1L2

Ministère de l'Éducation

Sous-ministre

Édifice Mowat  
Queen's Park  
Toronto ON M7A 1L2



**Memorandum To:** Directors of Education  
Supervisory Officers of School Authorities  
Executive Director, Provincial and Demonstration Schools Branch

**From:** Bruce Rodrigues  
Deputy Minister

**Date:** May 1, 2018

**Subject:** Final Report – Review and assessment of Ontario school board policies and procedures on outdoor education/excursions involving water-related activities

I am writing to update you on the third party review of school board policies and procedures for safety during outdoor education excursions involving water-related activities. Thank you for your participation in the review. Deloitte Inc. (Deloitte) relayed that they encountered overwhelming support from you and your staff during their data collection, and that the passion and dedication of school board staff for delivering safe outdoor education opportunities to students was evident throughout the review process.

Deloitte has completed its work for the ministry and has submitted a final report. The Executive Summary of this report and a presentation on the findings and recommendations are attached. The full report will be sent to you once it has been translated by the end of May.

As you know, this review was initiated in response to the tragic death of a student during an excursion in Algonquin Park in July 2017. The purpose of the review was to determine:

- whether school boards have policies and procedures in place that meet the minimum standards for risk management during outdoor education/excursions with water-related activities; and
- how school boards monitor implementation and ensure compliance with existing policies and procedures.

.../2



-2-

The report outlines that the majority of school boards that responded to Deloitte's online survey have policies and/or procedures in place. I would like to emphasize that the ministry's expectation is for all school boards to ensure that they have outdoor education/excursion policies and/or procedures in place that meet or exceed the minimum standards laid out in the Ontario Physical Education Safety Guidelines managed by Ophea.

We also expect that boards are reviewing and updating these policies and/or procedures regularly. I urge you to review your existing policies and procedures in light of this report and consider whether any enhancements are needed, for example to include considerations related to the diversity of your board's student population.

As a critical part of this review, please consider opportunities to further support board and school staff with the implementation of policies and/or procedures, including the need to strengthen monitoring and compliance activities.

### **Next Steps**

The Ministry of Education accepts the recommendations in the Deloitte report and is committed to addressing them collaboratively with our school boards and other partners. For instance, the report's findings indicate there is a desire for greater training, guidance, and resources for school boards and schools. In response, the ministry will develop or enhance training modules related to safety during outdoor education/excursions, explore opportunities for more centralized online hosting of resources related to outdoor education/excursions, and facilitate a community of practice to support ongoing information sharing between school boards. We will engage with school boards in the coming months to further discuss a detailed plan to respond to the recommendations.

We recognize the need for cooperation across the sector as we work to address these recommendations and prioritize student safety during all curriculum-linked learning experiences, including outdoor excursions. Where possible, we will leverage existing opportunities and align efforts related to student injury prevention to enhance a culture of safety-mindedness for everyone in the school environment. Further actions may be identified when the Ontario Provincial Police and Coroner investigations into the incident last summer are complete.

### **Webinar**

As an immediate step, the Safe and Healthy Schools, Program Implementation, and French-Language Teaching and Learning branches are offering a series of webinars to discuss the funding model and reporting tool for outdoor education. We will also solicit initial feedback to help us prioritize the types of resources and/or training modules related to safety during outdoor education/excursions that would be most useful for boards.

.../3

-3-

Outdoor education leads in English-language boards can join one of the following two webinars:

- May 7<sup>th</sup> from 1:00pm – 3:00pm.
- May 8<sup>th</sup> from 10:00am – 12:00pm.

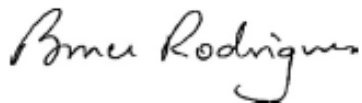
Outdoor education leads in French-language boards can join the following webinar:

- May 8<sup>th</sup> from 1:00pm – 3:00pm.

Details on the webinars and registration will be sent to your board's outdoor education lead in the coming days.

We look forward to working together as we address the recommendations to support the delivery of safe outdoor education opportunities for all students.

If you have any questions about the report or next steps, please contact Debbie Thompson, Director of the Safe and Healthy Schools Branch, at [debbie.thompson@ontario.ca](mailto:debbie.thompson@ontario.ca) or (416) 325-7645.



Bruce Rodrigues  
Deputy Minister

Attachments:

- Executive Summary of Deloitte Report
- PowerPoint Slide Presentation prepared by Deloitte

c: Denise Dwyer, Assistant Deputy Minister, Indigenous Education and Well-Being Division  
Denys Giguère, Assistant Deputy Minister, French-Language Teaching, Learning and Achievement Division  
Martyn Beckett, Assistant Deputy Minister, Student Achievement Division  
Debra Cormier, Director, Field Services Branch  
Council of Ontario Directors of Education

# Toronto District School Board

Operational Procedure ~~PR511~~PR-511-SCH

Title: **EXCURSIONS**

Adopted: June 24, 2004

~~Effected:~~ June 24, 2004

Revised: ~~April 15, 2008,~~ October 27, 2005, May 9, 2005, September 30, 2004, August 30, 2004, April 15, 2008; February 2, 2021

~~Reviewed:~~ February 2, 2021

Authorization: Executive Council

## 1. RATIONALE

This Excursions Procedure supports the implementation of the Excursions Policy (P033) and is consistent with TDSB's commitment to the equitable inclusion of all students in Excursions, field trips and educational extra-curricular activities.

## 1.2. OBJECTIVE

To establish processes~~provide a process~~ and requirements~~guidelines~~ for carrying out safe and inclusive Excursion~~excursions~~ in accordance with the Excursions~~Board~~ Policy (P033)~~.P-033-SCH, Excursions~~

## 2.3. DEFINITIONS

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

Commercial Excursion refers to commercially~~Excursions~~ Commercially organized or advertised events.

Excursion refers to any~~Any~~ approved school- or TDSB~~board~~-organized educational activity involving students that takes place off school or TDSB

property, which may include, but are not limited to, visiting a museum e.g., ROM, leadership camps, end-of-year class trips, attending sports games and tournaments, overnight and away from school, out of town/weekend trips, physical education activities, interschool athletics/activities, virtual experiences. Where applicable, at a minimum, excursions and activities involved should be in accordance with the OPASSE as produced by OPHEA. ~~involve physical activity, please refer to the Health & Physical Education Safety documents for safety and supervision requirements.~~ If students regularly travel to a location as part of their curricular program, for example, Learn to Swim, e.g., Family Studies, Design & Technology, and Cooperative Education placements, TDSB then excursion forms may are not be necessary. However, Parents/Guardians parents must be informed of dates, location, Supervision supervision and method of travel, for example, walking, public transportation or private transportation. Graduation ceremonies, school proms, ~~and~~ dances off school property and other formal and semi-formal events are not considered to be Excursions for the purpose of excursions.

~~—— High-Care Activities “High-care activities,” as used in this document.~~

Excursion and Events Facilities Directory refers to a TDSB internal directory available exclusively to TDSB staff that identifies approved and not approved excursion and event facility providers.

Excursion Management Application (“EMA”) refers to the on-line TDSB excursion management application developed to streamline the generation of excursion forms and approval process for Excursions.

EMA refers to the TDSB Excursion Management Application.

GTA refers to the Greater Toronto Area

High-Care Activity refers, refer to those types of activity(ies) activities that involve(s) increased risk and/or special safety considerations and may include, along with one or more of the following (but are not limited to):

- potential for adverse multiple risks, e.g., weather;
- occur in or on the water (with the exception of timetabled physical education water activities, or outdoor education water activities scheduled by the Centrally Assigned Principal Coordinator of Outdoor Education, or travel on large water vehicles used for public transportation); ~~or~~
- require special qualifications or certification for Supervision; supervision; ~~or~~
- take place away from easy access to first aid;
- overnight; and/or
- travel outside the Greater Toronto Area.

**\*Note: Higher-Risk Sports as listed in the OPASSE as set by the OPHEA.**



Inclusion, as per the Excursions Policy (P033), refers to ensuring that appropriate cultural backgrounds~~Physical Education Interscholastic Athletics Safety documents in interscholastic athletics~~ are **not** considered of all students (e.g., reflecting different ways of knowing and being) when planning and carrying out excursions and excursion related~~to be high-care~~ activities at TDSB. Excursions and excursion related activities should be welcoming, safe, engaging, and appropriate to the age, maturity,~~excursions. (See also Appendix C: High-Care Activities.)~~

*Informed Consent* refers to the Parent's/Guardian's consent/permission~~Consent~~ given after all reasonable efforts have been made to fully explain the excursion or the activity and any reasonably foreseeable risks associated with that excursion or activity. activity; ~~a reasonable effort would include measures such as translation or interpretation in the consenting person's first language.~~

OPASSE refers to the Ontario Physical Activity Safety Standards in Education.

OPHEA refers to the Ontario Physical and Health Education Association.

*Out-of-Country* Excursion ~~refers to any excursions~~~~Excursions~~ that involve travel to countries/destinations outside of Canada.

Parent/Guardian for the purpose of this document, refers to a biological parent, or a person who has legally adopted a child, or is otherwise deemed by law to have parental status, or a legal guardian, or any caregiver legally recognized as acting in the place of a parent/legal guardian, who holds decision-making responsibility over a student, **and** is on record with the school as a parent or legal guardian of a student at the school.

Parent/Guardian for Parents ~~For the purpose~~~~purposes~~ of this document, refers to a biological~~the term parent,~~ or a person who has legally adopted a child, or is otherwise deemed by law to have parental status, or a legal guardian, includes guardians or any caregiver legally recognized as acting in the place of a parent/legal guardian **and** is on record with the school as a parent or legal guardian of a student at the school.

*Program Service* Provider for the purpose of this document refers to external organizations, companies and agencies~~Providers~~~~Organizations~~ that provide services, programs, activities and/or facilities that are used for Excursions or Excursion-related activities~~excursions~~.

*Student Excursion Report* refers to a report~~Report~~ generated by Trillium or EMA that lists all the students on the Excursion~~excursion~~, their addresses, phone numbers and emergency contacts, along with any health issues in accordance with the TDSB privacy obligations. This report can be generated for a class list or a team/group list. ~~See your attendance secretary for information on how to access this report.~~

Student ~~Tour~~ refers to ~~Tours~~— Commercial ~~Excursions~~excursions, lasting more than one day, involving travel and accommodation paid for by students or their Parents/Guardians.

Supervision refers to overseeing—Overseeing for the purpose of regulation, direction, or ensuring safety and security of excursion participants.

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

Volunteer, for the purposes of this document, refers to a person who may assist in the Supervision of Excursions and physical education activities. Examples of volunteers may include instructional assistants, educational assistants, retired teachers, cooperative students, Parents/Guardians and teacher candidates. These volunteers will not be the sole supervisors of any Excursions or Excursion-related activities.

### 3.4. RESPONSIBILITY

Associate Director, Equity, Well-Being and School Improvement

## 5. APPLICATION AND SCOPE

This procedure applies to all employees, TDSB Trustees, students, occasional staff, Parents/Guardians, Program Service Providers, Volunteers, and TDSB employed or affiliated registered medical/health professionals.

~~Associate Director~~

### 4.6. PROCEDURES

This ~~Procedure~~procedure is divided into sections as indexed below:

<u>Section</u>	<u>Page</u>
A. Other Considerations	5
A.1 Accommodation of Religious Requirements, Practices,	
and Observances	5
A.2 Physical Education/Interschool Athletics	5
A.3 <u>Virtual Excursions</u>	
A.4 Other Program Areas	5
B. Medical Requirements	6
C. Restrictions	6
D. Risk/Liability	7
E. Minimum Responsibilities	7
E.1 Principals	7
E.2 Teachers	9
E.3 Volunteers	12

	E.4	Students	13
	E.5	Parents/Guardians	14
	E.6	Superintendents of Education	15
F.		Application and Approval	16
	F.1	Excursions within Walking Distance of the School	17
	F.2	Series of Scheduled Events or Class Activities	18
	F.3	<u>Unauthorized</u> <del>Non-Sanctioned</del> Excursions	18
	F.4	Commercial Excursions, Out-of-Country Excursions, and Student Tours	18
G.		Supervision	20
	G.1	Principles of Supervision	20
	G.2	General <u>Requirements</u> <del>Guidelines Regarding Supervision</del>	
	G.3	<u>Water-based Excursions</u>	
	G.4	<u>Non-Athletic Related Excursions</u>	
		Minimum Supervision Ratios	21
H.		Waivers	24
I.		<u>Billeting</u>	24
J.		Transportation	24
	J.1	Boat and Air Transportation	25
	J.2	Use of Buses and Vans	25
	J.3	<u>Student</u> Tour Companies	26
	J.4	Volunteer Drivers Using Vehicles or Another Licensed Automobile	26
	J.4(c)	Child Seating and Restraint Systems -(Car Seats, Booster Seats, )	26
	J.4(d)	Seatbelts)	27
	J.4(d)	<u>Seatbelts</u>	
	J.4(e)	Student Driver Using Private Vehicle	27
	J.4(f)	Personal Automobile Insurance Coverage	28
	J.5	Educational Staff Renting Vehicles	28
	J.6	Educational Staff Using <u>TDSB</u> <del>Board</del> Vehicles	29
	J.7	Student Identification for Transport	29
	J.8	Travel in Inclement Weather	29
	J.9	Transportation of Excursion-Related Equipment and Supplies	29
	J.10	Public Transportation	30
J.	K.	<u>Funding and</u> Excursion Costs	31
K.		Risk Management	31
	L.1	Contingency Planning	31
	L.2	Medical and Emergency Procedures	33
	L.3	Emergency Communications	34
	L.4	Early Termination of Excursions	34
	L.5	Requirements of Program Service Providers	34

## 1. APPENDICES

~~Appendix A: Summary of Approval Requirements (excluding Physical Education/Athletics)~~  
~~Appendix B1: Summary of Approval Requirements for Physical Education Curricular Activities~~  
~~Appendix B2: Summary of Approval Requirements for Intramural Activities~~  
~~Appendix B3: Summary of Approval Requirements for Interschool Athletics~~  
~~Appendix C: High-Care Activities~~  
~~Appendix D: Supervision [as excerpted from the Physical Education/Outdoor Education Curricular Safety documents]~~  
~~Appendix E: Excursion Procedures Questions and Answers~~  
~~Appendix F: Parents'/Guardians' Responsibilities for Excursions~~  
~~Appendix G: Students' Responsibilities on Excursions~~  
~~Appendix H1: Emergency Procedures Checklist: Accident~~  
~~Appendix H2: Emergency Procedures Checklist: Missing Student~~  
~~Appendix I: Health Coverage~~

## ~~1. REFERENCE DOCUMENTS~~

### ~~A. OTHER CONSIDERATIONS~~

~~A.1~~ ~~Board Policy P.033 SCH: Excursions~~  
~~Operational Procedure PR.563: Anaphylaxis~~

#### **~~Forms:~~**

~~511A: Request for Excursion Approval by Principal~~  
~~511B: Request for Excursion Approval by Superintendent of Education~~  
~~511C: Parent/Guardian Permission for Excursion~~  
~~511E: Medical Information for Excursions~~  
~~511F: Principal Authorization for Volunteer Drivers~~  
~~511G: Formal Contingency Plan~~  
~~511H: Walking Excursion—Immediate Community~~  
~~511I: Interschool Athletics Tryouts and Participation (Elementary)~~  
~~511J: Interschool Athletics Tryouts and Participation (Secondary)~~  
~~511K: Physical Education Information and Intramural Information/Permission~~

#### **~~Checklists:~~**

~~511L: Principal's Excursion Checklist~~  
~~511M: Superintendent's Excursion Checklist~~  
~~511N: Excursion Checklist: Day Excursion—In/Outside GTA~~  
~~511O: Excursion Checklist: Day Excursion—High-Care in/outside GTA~~  
~~511P: Excursion Checklist: Day Excursion—Overnight in/outside GTA~~  
~~511Q: Excursion Checklist: Day Excursion—Overnight High-Care in/outside GTA~~  
~~511R: Excursion Checklist: Day Excursion—Overnight Out of Province or International~~

#### **~~OTHER CONSIDERATIONS~~**

Accommodation of Religious Requirements, Practices, and Observances

- a) ~~TDSB schools~~Schools and workplaces should make every reasonable effort to be aware of the religious observances of their staff, students, and community when planning special meetings, examination schedules, school concerts, parent interviews, field trips, and other ~~schools~~significant events or gatherings. These ~~considerations~~limitations do not apply where it is known that none of the potential participants would observe the particular day in question.
- b) For additional information regarding Holy Days, please consult TDSB Guidelines and Procedures for the Accommodation of Religious Requirements, Practices, and Observances (pages 6 and 7), or [www.interfaith.org/calendar.asp](http://www.interfaith.org/calendar.asp).

## A.2 Physical Education/Interschool Athletics/Activities

The appropriate workflow will be completed using EMA to generate the appropriate Parent/Guardian permission for the Excursion. The teacher in charge of the Excursion will follow the specific information as set out by OPHEA in the OPASSE.

## A.3 Virtual Excursions

It is assumed that Virtual Excursions will meet the criteria of all other Excursions and will happen within the instructional setting of the class (classroom or on-line platform). The appropriate workflow will be completed using EMA to generate the appropriate Parent/Guardian acknowledgement for the Excursion. The principal, or designate, will approve the curriculum connected experiences, prior to the excursion taking place.

- ~~(a) — A.4 Where the excursion involves physical education, intramural activities, an athletic event, or a series of athletic events, the teacher/coach/staff supervisor shall prepare the appropriate athletics parent permission form in lieu of Form 511C: Parent/Guardian Permission for Excursion. (Forms pertaining to athletic activities are Forms 511I, 511J, and 511K.)~~
- ~~(b) — For detailed information about procedures, supervision requirements, and approvals of excursions involving physical activities, the teacher shall follow the Physical Education/Outdoor Education Elementary and Secondary Curricular Safety documents, and/or the Physical Education Elementary and Secondary Interschool Athletics Safety documents, and/or the Physical Education Elementary and Secondary Intramural Safety documents. These documents are also available in all schools from the Principal, the school Health and Physical Education Department (secondary), and the central Health and Physical Education Department, and/or may be purchased through the Tippet Centre (tel.: 416-397-2595; e-mail: curriculumdoes@tdsb.on.ca).~~
- ~~(c) — Activities that are listed in the Physical Education/Outdoor Education Elementary and Secondary Curricular Safety documents, or the Physical Education Elementary and Secondary Interschool Athletics Safety documents, or the Physical Education Elementary and Secondary Intramural Safety documents (or related Board documents) will generally be approved, if requirements have been met in accordance with curriculum and related safety documents and this Excursion Policy. (See Appendix A: Summary of Approval Requirements (excluding Physical Education/Athletics);~~

~~Appendix B1: Summary of Approval Requirements for Physical Education Curricular Activities, Appendix B2: Summary of Approval Requirements for Intramural Activities, and Appendix B3: Summary of Approval Requirements for Interschool Athletics.)~~

### Other Program Areas

The teacher in charge of the excursion should consult appropriate curriculum and safety documents for requirements specific to other program areas.

### **B. MEDICAL REQUIREMENTS**

At the beginning of the school year, ~~schools the school will send out Form 511E: Medical Information. This form should request that Parents/Guardians complete TDSB's medical be collected and the information form provided either in electronic form/online via EMA or in hard copy (TDSB's Form 511 entered into Trillium. It is not necessary to complete another Form 511E: Medical Information for Excursions).~~ This medical information is collected in accordance with TDSB privacy obligations and entered into Trillium and/or EMA by schools.

During the same school year, it is not necessary for Parents/Guardians to complete another Form 511: Medical Information for Excursions in electronic form/online via EMA or in hard copy any excursion, except for an overnight Excursion or if there have been any changes to the student's medical information.

~~excursion. Overnight interschool athletics Interschool Athletics excursions within the province of Ontario do not require an additional medical information form Form 511E: Medical Information to be completed by Parents/Guardians. Once the medical information is entered into Trillium and/or EMA, Trillium or EMA will generate a Student Excursion Report that outlines the student's highlights students' medical/health information. The generated (For the definition of a Student Excursion Report, see page 2 of the Excursion Procedures.) This Student Excursion Report must be generated and carried for each Excursion by the teacher in charge of the Excursion. excursion/sports activity. Parents/Guardians will also have the opportunity to update medical information for their child throughout the school year by completing another using Form 511: Medical Information 511C: Parent/Guardian Permission for Excursions Excursion (or the appropriate athletics activity form) in hard copy or in electronic form using EMA.)~~

### **C. RESTRICTIONS**

- a) An appropriate and related program, including assessments, ~~will~~shall be planned for all students who do not participate in the ~~Excursion excursion~~. Conversely all students participating in an ~~Excursion will~~excursion shall be allowed to complete any assignments or assessments missed due to the ~~Excursion excursion~~ within a reasonable time after the ~~Excursion excursion~~, without penalty.
- b) The principal ~~will~~shall ensure that a sufficient number of teachers and adult supervisors accompany students on all ~~Excursion excursions~~ in accordance with the minimum ~~Supervision supervision~~ ratios outlined in this document (See Section G: Supervision for more information on Supervision ratios). Efforts should be made to include adults or older students who speak the languages of some of the students, especially when ~~newcomers to Canada recent arrivals~~ are among the group (~~See Procedures, Section G: Supervision~~).
- c) Schools and school staff/administration will not authorize any Excursions~~The Board assumes no responsibility or liability for activities or events~~ that do not comply



with the requirements outlined in this document and the Excursions Policy (P033). School staff/administration and teachers should not initiate or. ~~Teachers shall not~~ become involved in Excursions, student activities or events that do not meet the requirements outlined in this document.

- d) No ~~TDSB~~~~Board~~ employee, external organization or Program Service Provider will ~~shall~~ engage in the distribution of any literature, documents or material on school/TDSB property or use any equipment or TDSB property.
- ~~d)e)~~ Staff are not of the Board to organize, promote or discuss any Excursion~~excursions~~ that do not comply with the requirements outlined in this document or that have not been formally approved by TDSB.
- ~~e)f)~~ No ~~TDSB~~~~Board~~ employee will~~shall~~ use any forms, literature, or any documents that may indicate to the Parents/Guardians and~~custodial parents~~ or the students that unapproved Excursion~~excursions~~ have been approved by TDSB~~the Board~~.
- ~~f)g)~~ Any teacher, school staff member, or principal or his/her designate who becomes aware of an Excursion, activity or event that has not been formally approved by TDSB according to the requirements of this document will~~shall~~ make every effort to inform the students involved, and their Parents/Guardians of the 'not approved' status of~~custodial parents, that~~ the Excursion~~Board does not assume any responsibility for such~~ activity or event.

## D. RISK/LIABILITY

- a) Excursions involve risks and responsibilities different from those encountered in the classroom.
- b) ~~TDSB's~~~~The Board's~~ liability insurance policy protects both staff and volunteers who are working within the scope of their duties for TDSB, from third party claims~~the Board~~. The insurer responds to lawsuits that are brought against staff or volunteers who are supervising the Excursions, school events and activities approved by the principal, the Superintendent of Education and the Executive Superintendent of Education, where applicable~~and provides protection up to \$20 million for each occurrence~~.

## E. MINIMUM RESPONSIBILITIES

### E.1 For Principals (See also see Procedures, Section E.6: Superintendents of Education).

- a) At the beginning of the school year, principals will~~shall~~ ensure that:
  - i. A student data verification sheet~~a Student Data Verification Sheet~~ is distributed to each student. This sheet~~form~~ should be completed and signed by the Parents/Guardians~~parents/guardians~~ (or the adult student~~(age students aged 18 years or over)~~). Where a student of 16 or 17 has withdrawn from parental control, the student can complete and sign the student data verification sheet. Completed student data verification sheet~~,~~



~~and signed. Signed forms~~ should be returned to the school and these that changes ~~should be~~ entered into Trillium.

- ii. The completed and signed Form 511511E: Medical Information for Excursions outlining the student's medical/health information and condition, if any and, has been obtained from parents, authorizing the teacher in charge of the Excursionexcursion to seek and obtain medical care, if necessary, for the student, has been obtained from the Parents/Guardians. The Parents/Guardians also have an option to either provide or update their child's medical/health information via EMA by completing an online form.- **Principals must ensure that the student's medical information provided either electronically via EMA or in hard copy is entered into Trillium.** The entering of this information into Trillium ~~should be~~ a top priority for schools, as this is a health and safety issue.

- ~~The student data verification sheet and each parent/guardian receives a copy of the Parents'/Guardians' Responsibilities for Excursions (see Appendix F).~~
- ~~each parent receives a copy of Form 511511K: Physical Education Information and Intramural Information/Permission.~~

- b) ~~The Student Data Verification Sheet and Form 511E: Medical Information for Excursions should be kept and filed (hardcopies) or stored in electronic formaten file in the office. Form 511K should be returned to the Physical Education staff.~~
- c) The principal ~~will~~shall make the decision to approve or not approve any Excursionexcursion and/or participants, ~~(Form 511A: Request for Excursion Approval by Principal, or the appropriate athletics form)~~ including those requiring additional approval from the Superintendents of Education and the Executive Superintendentsuperintendents of Education, where applicable.education. External waivers or releases from external organizations or Program Service Providers must be acceptable to the TDSBBoard's Legal Services and/or Risk Management Department(s) and approved by the Superintendent superintendent of Education and Executive Superintendent of Education, where applicable (See Section E.6: Superintendents of Education). Principals will ensure that school staff and teachers are **only** selecting approved excursion destinations and approved Program Service Providers found in the TDSB Excursion and Event Facilities Directory.education. ~~(See Procedures, Section E.6: Superintendents of Education.)~~

- d) For those ~~Excursion~~excursions that require the additional approval of the Superintendent of Education, at least~~superintendent of education~~, one (1) month prior to the ~~Excursion~~excursion, the principal ~~will~~shall submit, ~~as required, documentation necessary for the Form 511B: Request for Excursion Approval by Superintendent of Education's approval via EMA.~~
- d)e) **For overnight Excursions outside of Ontario,** ~~accompanied by 511A: Request for Excursion Approval by the Principal as completed by the teacher, and 511C: Parent/Guardian Permission for Excursion. Note: Form 511B: Request for Excursion Approval by Superintendent of Education (and the Executive Superintendent of Education, where applicable) must be submitted at least three (3) months in advance, and for Out-of-Country Excursions, Request for Excursion Approval by the Superintendent of Education and the Executive Superintendent of Education must be submitted for overnight excursions outside of the province, and at least six (6) months in advance. In order to plan for the necessary approval(s), for those Excursions that require the additional approval, school staff and teachers should draft their Excursion proposal and receive the principal approval first, prior to submitting a formal request for approval to the Superintendent of Education and the Executive Superintendent of Education, where applicable for overnight excursions outside of the country.~~
- e)f) The principal or his/her designate identified to the teachers ~~will~~shall be available by telephone, cellular telephone, or other wireless means of communication to teachers in charge of the Excursion in case an emergency arises at any time during the Excursion. The principal will keep their mobile phone on them at all times during the Excursion. The phone number (the principal mobile) or contact information for the principal or his/her designate should be kept with the teacher in charge during the Excursion. The Excursion itinerary and phone number(s) for school staff while on the Excursion should be available to the principal and school office during the Excursion~~case an emergency arises at any time during the excursion.~~
- g) In accordance with the TDSB Restrictions on Alcohol, Drug and Tobacco Use Policy (P095), all persons attending Excursions are prohibited from being in the possession of, or under the influence of alcohol or drugs (including cannabis) while on TDSB premises or while engaging in TDSB related activities and Excursions. Personal time, such as sightseeing, shopping or other forms of personal entertainment, including the involvement of alcohol or drugs, for staff and volunteers participating in an excursion are not permitted. Family, friends, pets or students from other boards are also not permitted to participate in an excursion.
- (a) ~~The principal will designate at least one (1) The principal shall keep with him or her at all times, as well as posting in the office:~~
- ~~• the phone number or contact information for the principal or designate; and~~
  - ~~• the excursion itinerary and phone numbers for the teacher while on the excursion.~~

- ~~f)h)~~ ~~The principal shall designate one~~ certified teacher from the school as the teacher in charge of the Excursion~~excursion~~. The principal ~~should~~shall not designate an occasional teacher as teacher in charge of ~~the Excursion~~an excursion, unless the occasional teacher is a long-term occasional teacher, who, in the judgment of the principal, has sufficient knowledge about the students and the nature and activity of the Excursion~~excursion~~.
- ~~g)i)~~ The principal ~~will~~shall ensure that a sufficient number of teachers and adult supervisors accompany students on all Excursion~~excursions~~, in accordance with the minimum Supervision~~supervision~~ ratios outlined in this document. Efforts should be made to include adults or older students who speak the languages of some of the students, especially when newcomers to Canada~~recent arrivals~~ are among the group. (See ~~Procedures~~, Sections G.2: Supervision, paragraphs (f) and G.2-(p)), for minimum Supervision~~supervision~~ ratios.)
- ~~h)i)~~ The principal ~~will~~shall make every effort to ensure that a completed and signed (either online via EMA or in hard copy)~~Form 511G: Parent/Guardian Permission~~ for Excursion (or appropriate athletics form) is obtained for each student participating in an Excursion~~excursion~~.
- ~~i)k)~~ Once the Excursion has been approved by TDSB, the~~The~~ principal and the teacher(s) in charge of the Excursion should consider holding Parent/Guardian~~parent~~ information sessions, except for~~when~~ overnight Excursions where it is mandatory~~excursions~~ are planned, to outline the educational purpose, explain risks, address any concerns and answer any questions.
- ~~j)l)~~ The principal ~~should~~shall ensure that all excursion supervisors are aware of relevant medical concerns for all excursion participants.
- ~~m)~~ The principal should ensure that the Excursions reflect the Board's commitments to inclusion and equity and do not limit any students, for example, due to accessibility or financial constraints.
- ~~k)n)~~ All Volunteers~~shall make every effort to approve all volunteers on excursions, including volunteer drivers~~ should be approved by the principal prior to the commencement of the Excursion.
- ~~l)o)~~ The principal ~~will~~shall make every effort to inform the Volunteers~~volunteers~~ about their responsibilities and about requirements for insurance as outlined in this document (See~~Procedures~~, Section E.3: For Volunteers). The principal will request that all Volunteers sign a TDSB approved waiver as well as have proof of police background check to participate in an Excursion prior to the commencement of the Excursion~~Volunteers of this document.~~
- ~~m)p)~~ If the Excursion involves the use of volunteer drivers, these volunteer drivers are required to complete and sign Form 511F: Principal Authorization for Volunteer Drivers. The principal will make the decision to approve or not approve this form/volunteer driver.~~The principal's signature is required on Form 511F: Principal Authorization for Volunteer Drivers to authorize volunteer drivers and their private~~

vehicles for transportation of students on Excursions. Volunteer drivers should be used in limited situations~~an excursion~~.

- i. If the Excursion~~excursion~~ involves the use of volunteer drivers, the principal ~~should~~shall ensure that Form ~~511~~511G: Parent/Guardian Permission for Excursion (or appropriate athletics form) includes specific information about the volunteer drivers and the vehicles being used, and that every effort is made to obtain consent from Parents/Guardians for each Excursion for students to travel in specified private vehicles with specific volunteer drivers. The requirements for volunteer drivers include a valid (unrestricted) Ontario Class G driver's license, a 3-year uncertified driver's record, personal automobile insurance coverage, and a vehicle that is in good working condition. Volunteer drivers must be over 25 years old and show proof of liability insurance on the vehicle of at least \$2,000,000. Every occupant of the vehicle must have appropriate seating and restraints (See Section I.4: Transportation, paragraph (c): Child Seating and Restraint Systems (Car Seats, Booster Seats, Seatbelts). Volunteer drivers may have no more than four 4/7 occupants, including driver, and no pets, in any vehicle. Passenger vans, for example, that could transport 10 or more occupants, are not permitted~~for each excursion for students to travel in specified private vehicles with specific volunteer drivers~~. Note: All drivers must comply with any new Government regulations.

- ii. Volunteer drivers should not drive themselves or other students to any activity outside of the Excursion.

~~(b)~~ The principal ~~will~~shall ensure that contingency planning is part of every Excursion~~excursion~~. ~~(See Procedures, Section L.1: Contingency Planning.)~~ A formal contingency plan ~~(Form 511G: Formal Contingency Plan)~~ is part of every High-Care Activity~~high-care~~ or overnight Excursion~~excursion~~ (except Excursions~~excursions~~ to TDSB Board Outdoor Education schools~~Schools~~ scheduled by the Centrally Assigned Principal~~Coordinator~~ of Outdoor Education, and overnight interschool athletics Excursion~~excursions~~) and must be approved by the appropriate Superintendent of Education~~superintendent~~.

~~n)q)~~ The principal shall ensure, wherever possible, that supervisors on an excursion shall carry copies of the emergency procedures checklists for accidents and the Executive Superintendent of Education, where applicable, missing students (see Appendices H1 and H2 respectively).

~~e)r)~~ Wherever possible, supervisors on an Excursion must~~excursion shall~~ carry cellphones and/or two-way radios. Where cellphones and/or two-way radios are the property of the school or TDSB, the principal ~~will~~shall make such items available to supervisors on an Excursion~~excursion~~. Supervisors ~~must~~shall ensure that cellphones and/or two-way radios are in good working condition, and that any batteries are fully charged prior to the Excursion~~excursion~~.

~~p)s)~~ During the Excursion preparations, the~~The~~ principal ~~will consider~~shall take into consideration:

- i. if a student has a serious medical/health condition; ~~and/or~~

- ii. if the excursion destination is compatible for all students;
  - iii. preparations for student abilities, such as swim tests, have been completed;
  - iv. if the administration of medication is too complicated; or
    - \* if a student has engaged in serious misconduct, including breach of the Board Code of Conduct (PR585), the school's ~~school~~ Code of Behaviour, and/or the Code of Behaviour for Athletes (for interschool athletics), and other applicable TDSB policies and procedures;
  - v. to determine whether a student participates in an ~~Excursion~~excursion.
- t) The principal ~~will~~shall ensure that one copy of all appropriate approved forms (e.g., all completed and signed Parent/Guardian Permission for Excursion; for interschool athletics, the appropriate athletics forms, including the approved team lists; for physical education class Excursions, the appropriate completed forms; and other forms pertinent to the Excursion) are on file ~~in the school~~ until at least the end of June of the current school year following the school year in which the ~~Excursion~~excursion takes place.

## **E.2. For Teachers**

- a) The teachers participating in anThis includes Form 511A: Request for Excursion must be familiar with the content of the Excursions Policy (P033), this procedureApproval by Principal and any associated documents andother forms.
- b) The teacher will ensure that each, if appropriate (Form 511B: Request for Excursion has an educational purpose with curricular relevance that is clearly identified to the students and their Parents/Guardians.
- c) The teacher will ensure each Excursion is equitable and inclusive. For excursions with high costs per student and/or involving 15 or fewer students out of a pool of students of 20 or more, a teacher must provide an explanation addressing the student participation.
- d) The teacher must complete and submit to the principal via EMA all excursion request(s)/form(s) that require approval by the principal and/or approvalApproval by the Superintendent of Education at least one (1) month prior to the scheduled Excursion. Note: In order to plan for the approval, for those Excursions that require the additional approval, teachers must draft their Excursion proposal and receive the principal approval of the Excursion proposal prior to submitting a formal request for approval to the principal and/or the Superintendent of Education and the Executive Superintendent of Education, where applicable. Where applicable, teachers should select approved excursion destinations found in the TDSB Excursion and Event Facilities Directory. No communication to Parents/Guardians should take place unless approval is first obtained.
- e) All external waivers, releases, acknowledgements, booking or registration forms and other documents/forms provided by Program Service Providers must be approved by TDSB Legal Services and/or Risk Management Department and by the Superintendent of Education.



- f) In accordance with Ontario *Travel Industry Act*, 2002 and Regulation 26/05, overnight Excursions not related to a competition or involving a camp, camping or out tripping, must be arranged through TDSB approved travel agent(s) (retailers) and travel wholesalers (for example, tour operators) registered with the Travel Industry Council of Ontario (“TICO”).
- g) Teachers must use only approved excursion vendors in the Excursion and Event Facilities Directory. A Principal and, if required, a Superintendent could make an exception.
- h) The teacher in charge of the Excursion will ensure that contingency planning is part of every Excursion, especially of every High-Care Activity or overnight Excursion (except Excursions to TDSB Outdoor Education schools scheduled by the Centrally Assigned Principal of Outdoor Education, and overnight interschool athletics Excursions) and must be approved by the principal and the Superintendent of Education and the Executive Superintendent of Education, where applicable.
  - i. Except for tour operator / commercial tours, the teacher must be familiar and have attended the excursion destination previously, for example, for a play, they must have attended that theatre.
  - ii. The teacher in charge of the Excursion will ensure, wherever possible, that supervisors on an Excursion will carry copies of the emergency procedures and student information as generated by the Trillium student excursion report or EMA.
  - iii. The teacher in charge of the Excursion will inform the principal of alternate plans for Supervision in case one or more supervisors are unable to attend the Excursion.
  - iv. Only once approval has been obtained, the teacher in charge of the Excursion will make every effort to inform students and their Parents/Guardians, of details of the Excursion, including costs, deposits, refunds, non-refundable costs, behavioural expectations, and any risks associated with the Excursion through either Form 511: Parent/Guardian Permission for Excursion or online via EMA.
  - v. The teacher in charge of the Excursion, in consultation with the principal, should consider holding Parent/Guardian information sessions when overnight Excursions are planned by the school, in order to outline the educational purpose, explain risks, and answer any questions.
  - vi. In exceptional circumstances, Excursion dates and times may change. The teacher will make every effort to inform students and their Parents/Guardians of these changes.
- i) The teacher in charge of the Excursion will make every effort to inform Parents/Guardians in writing through either Form 511: Parent/Guardian Permission for Excursion (or the appropriate athletics form) or online via EMA, of the names of any volunteer drivers participating in the Excursion, and specific information about the volunteer drivers’ vehicles.

- j) If the Excursion involves the use of volunteer drivers, the teacher will make every effort to ensure that consent from Parents/Guardians is obtained for each Excursion for students to travel in specified private vehicles with specific volunteer drivers (See Section E.1: For Principals, paragraph n).
- k) The teacher will make every effort to inform Parents/Guardians in writing through either Form 511: Parent/Guardian Permission for Excursion (or the appropriate athletics form) or online via EMA that Parents/Guardians will be responsible for any applicable losses or costs should their child engage in misconduct, including a breach of the Board Code of Conduct (PR585), the school's Code of Behaviour, or the Code of Behaviour for Athletes (for interschool athletics) during the Excursion. This could include costs for transportation home or for damages resulting from their child's misconduct.
- l) Where practical, teachers will provide Parents/Guardians with a cover statement in the student's first language, or the Parent's/Guardian's first language where different, describing the contents and importance of all forms and any other written communication regarding the Excursion. If this is not practical, teachers will provide Parents/Guardians with a standard letter that indicates that the attached forms are important and should be translated.
- m) The teacher in charge of the Excursion will arrange an appropriate and related program, including any assessments, for all students who do not participate in the Excursion. Conversely, all students participating in an Excursion will be allowed to complete any assignments or assessments missed due to the Excursion, within a reasonable time after the Excursion, without penalty.
- n) The teacher in charge of the Excursion must be aware of the details of all medical and emergency care information for all excursion participants prior to any Excursion outlined in the Student Excursion Report.
- o) The teacher in charge of the Excursion must inform all supervisors of relevant medical concerns for all excursion participants and expected interventions.
- p) The teacher in charge of the Excursion must ensure that all excursion participants have the appropriate visa(s), proof of citizenship, passports, Ontario Health Card number, and out-of-country health/accident/travel insurance policy(ies), as required, for each student and staff member for all Out-of-Country Excursions. The teacher in charge of the Excursion will check the Government of Canada Travel Advice and Advisories website ([travel.gc.ca](http://travel.gc.ca)) for specific travel advice for the destination.
- q) For the Excursion purposes, in particular for Excursions outside of Ontario or Out-of-Country Excursions, where a student is subject to a custody order, the consent of both Parents is recommended if there is joint custody. Sometimes both Parents have custody, but they disagree with each other on the child's educational matters. In that case, it is advisable for the school to ask both Parents to reach an agreement first as the school cannot follow the Parents' conflicting directions/instructions.

r) The teacher in charge of the Excursion will arrange and supervise all aspects of transportation required for the Excursion using TDSB approved vendors, including specialized transportation, when appropriate, for students with special needs.

(e) The teacher in charge of the Excursion will submit, via EMA, to the principal one copy of all appropriate approved forms (e.g. all completed and signed, all signed 511C: Parent/Guardian Permission for Excursion; for interschool athletics, the appropriate athletics forms, including the approved team lists; for physical education class Excursionexcursions, the appropriate completedsigned forms; and other forms pertinent to the Excursion) excursion).

(d) The Principal shall ensure that all teachers participating in the excursion receive a copy of the Excursions Operational Procedures.



**For Teachers**

- ~~(a) The teachers participating in an excursion must be familiar with the content of the Excursions Operational Procedures.~~
- ~~(b) The teacher shall ensure that each excursion has an educational purpose with curricular relevance that is clearly identified to the students and their custodial parents.~~
- ~~(c) The teacher shall complete and submit to the principal for approval Form 511A: Request for Excursion Approval by Principal (or appropriate athletics form). For those excursions that require the additional approval of the superintendent of education, at least one month prior to the excursion, the teacher shall submit to the principal Form 511B: Request for Excursion Approval by Superintendent, accompanied by 511A: Request for Excursion Approval by Principal as completed by the teacher, and 511C: Parent/Guardian Permission for Excursion. Note: Form 511B: Request for Excursion Approval by Superintendent must be submitted at least three months in advance for overnight excursions outside of the province, and at least six months in advance for overnight excursions outside of the country.~~
- ~~(d) External waivers must be acceptable to the Board's Legal Services Department and approved by the superintendent of education.~~
- ~~(e) The teacher shall ensure that contingency planning is part of every excursion. (See Procedures, Section L.1 Contingency Planning.) A formal contingency plan (Form 511G: Formal Contingency Plan) is part of every high care or overnight excursion (except excursions to Board Outdoor Education schools scheduled by the Coordinator of Outdoor Education, and overnight interschool athletics excursions) and must be approved by the principal and the appropriate Superintendent.~~
- ~~(f) The teacher shall ensure, wherever possible, that supervisors on an excursion shall carry copies of the emergency procedures checklists for accidents and missing students (see Appendices H1 and H2 respectively).~~
- ~~(g) The teacher shall inform the principal of alternate plans for supervision in case one or more supervisors are unable to attend the trip.~~
- ~~(h) The teacher shall make every effort to inform students, and custodial parents, of details of the excursion, including costs, deposits, refunds, non-refundable costs, behavioural expectations, and any risks associated with the excursion, in Form 511C: Parent/Guardian Permission for Excursion.~~

~~The teacher, in consultation with the principal, should consider holding parent information sessions when overnight excursions are planned, in order to outline the educational purpose, explain risks, and answer any questions.~~

~~In exceptional circumstances, excursion dates and times may change. The teacher shall make every effort to inform custodial parents of these changes.~~

- ~~(i) — The teacher shall make every effort to inform custodial parents in writing through Form 511C: Parent/Guardian Permission for Excursion (or the appropriate athletics form) of the names of any volunteer drivers participating in the excursion, and specific information about the volunteer drivers' vehicles.~~
- ~~(j) — If the excursion involves the use of volunteer drivers, the teacher shall make every effort to ensure that consent is obtained for each excursion for students to travel in specified private vehicles with specific volunteer drivers. (See Procedures, Section E.3: Volunteers.) See Form 511F: Principal Authorization for Volunteer Drivers.~~
- ~~\*Note: All drivers must comply with any new Government regulations.~~
- ~~(k) — The teacher shall make every effort to inform parents in writing through Form 511C: Parent/Guardian Permission for Excursion (or the appropriate athletics form) that they will be responsible for any applicable losses or costs should their child engage in misconduct, including a breach of the school's Code of Behaviour, or the Code of Behaviour for Athletes, during the excursion. This could include costs for transportation home or for damages resulting from misconduct.~~
- ~~(l) — Where practical, teachers will provide custodial parents with a cover statement in the student's first language, or the parent's first language where different, describing the contents and importance of all forms and any other written communication regarding the excursion. If this is not practical, teachers shall provide custodial parents with a standard letter that indicates that the attached forms are important and should be translated.~~
- ~~(m) — The teacher shall arrange an appropriate and related program, including any assessments, for all students who do not participate in the excursion. Conversely, all students participating in an excursion shall be allowed to complete any assignments or assessments missed due to the excursion, within a reasonable time after the excursion, without penalty.~~
- ~~(n) — The teacher shall be aware of the details of all medical and emergency care information for all participants prior to any excursion. See Student Excursion Report (Trillium).~~
- ~~(o) — The teacher in charge shall inform all supervisors of relevant medical concerns for all participants and expected interventions.~~
- ~~(p) — The teacher shall ensure that participants have the appropriate visa, proof of citizenship, passports, Ontario Health Card number, and out-of-country health/accident/travel insurance requirements, as required, for each student and staff member for all out-of-country excursions. The teacher will check the Consular Affairs Web site ([www.voyage.gc.ca](http://www.voyage.gc.ca)) for specific requirements for the destination.~~
- ~~(q) — Where the child is subject to a custody order, the consent of both parents is recommended if there is joint custody.~~

- (r) ~~The teacher shall arrange and supervise all aspects of transportation required for the excursion, including specialized transportation, when appropriate, for students with special needs.~~
- (s) ~~The teacher shall submit to the principal one copy of all appropriate approved forms to be kept on file in the school until at least the end of June of the current school year following the school year in which the Excursion excursion takes place. This includes Form 511A: Request for Excursion Approval by Principal and other forms, if appropriate (Form 511B: Request for Excursion Approval by Superintendent of Education; all signed 511C: Parent/Guardian Permission for Excursion; for interschool athletics, the appropriate athletics forms, including the approved team lists; for physical education class excursions, the appropriate signed forms; and other forms pertinent to the excursion).~~
- a)s) In the case of a ~~TDSB~~Board-organized ~~Excursion~~excursion, centrally assigned staff ~~will~~shall assume the responsibility of the teacher in charge of the Excursion, as approved by the department's immediate supervisor (with the exception of interschool athletics meets/-games/championships where teachers assume their normal rolesrole).
- b)t) The teacher in charge of the Excursion mustshall carry the Student Excursion Report (~~Trillium~~) on every ~~Excursion~~excursion.
  - (t) ~~E.3. Wherever possible, supervisors on an excursion shall carry cellphones and/or two-way radios. Where cellphones and/or two-way radios are the property of the school, the principal shall make such items available to supervisors on an excursion. Supervisors shall ensure that cellphones and/or two-way radios are in good working condition, and that any batteries are fully charged prior to the excursion.~~
  - (u) ~~Wherever possible, all supervisors on an excursion shall carry copies of the emergency procedures checklists for accidents and missing students (see Appendices H1 and H2 respectively).~~

### **For Volunteers**

- a) ~~Volunteers will have signed a waiver prior to the excursion.~~
- a)b) ~~Volunteers will~~shall adhere to all applicable TDSBthe policies, procedures, guidelines, protocols and practices ~~of the Board~~, and ~~will~~shall work under the Supervisionsupervision of the principal and teachers from the school or under the central department staff for the duration of all ~~Excursions~~excursions.
- b)c) ~~Volunteers will~~shall adhere to all applicable TDSB policies and the procedures of the Boardrelating to volunteers, including police reference checks and/-Volunteers who on a casual basis assist with a variety of activities or vulnerable sector screening (See TDSB Employee day excursions may not require a police reference check. Please refer to the Volunteer Protocol (SR23) regarding police reference checks (Volunteers section) at <https://www.tdsb.on.ca/Portals/0/Elementary/docs/SupportingYou/SR23.pdf>).Reg

~~arding Police Reference Checks.~~ Volunteers who accompany students on an overnight or multi-day ~~Excursion~~~~excursion~~ for the purpose of assistance with ~~Supervision~~~~supervision~~ must have a police reference check and/or vulnerable sector screening. Whenever possible, the principal should maintain a list of “approved” volunteers for Excursion purposes.

e)d) Volunteers who agree to transport students in private vehicles for an Excursion~~excursion~~ are required to complete a Form 511F: Principal Authorization for Volunteer Drivers. The principal will~~shall~~ make the decision to authorize or not authorize the volunteer driver and vehicle.

Volunteer~~Note: All~~ drivers must comply with any new Government regulations~~.~~

(a) ~~Volunteer drivers shall~~ have the automobile liability following current insurance, with a minimum limit of a \$2,000,000 coverage and history on any vehicle used to transport students for the Excursion (See Section E.~~excursion~~:

d)e) Motor Vehicle Liability, with a limit on liability of at least \$1: For Principals, paragraph n).~~,000,000;~~

- \* ~~E.4~~ Accident Benefit;
- \* ~~Uninsured Automobile.~~

### **For Students**

a) Teachers will~~shall~~ review the information about students' responsibilities~~Students' Responsibilities~~ on Excursions with students at the beginning of the school year. ~~This information is in Appendix G, and also in the student planner/handbook.~~ For interschool athletics, students will also receive a copy of the Code of Behaviour for Athletes found in the respective constitutions.

Students will~~shall~~ adhere to the TDSB Caring and Board's Safe Schools Policy (P051), the Board Code of Conduct (PR585), and the school's Code of Behaviour, and other applicable TDSB policies and procedures; for interschool athletics, in addition to the above, the Code of Behaviour for Athletes, for the duration of all Excursion~~excursions~~. Students who fail to adhere to the TDSB Caring and Safe Schools Policy (P051), the Board Code of Conduct (PR585), the school's Code of Behaviour, or the Code of Behaviour for Athletes (for interschool athletics) and other applicable TDSB policies and procedures, while on Excursions~~excursions~~ will be subject to the same consequences as if the students were in attendance at school during regular school hours.

b) While on Excursion~~excursions~~, and while travelling to and from Excursion~~excursions~~, students will continue to be responsible for their conduct, ~~to the principal.~~ Students will~~shall~~ comply with their obligations under section 23 of Regulation 298 of the *Education Act*, including the following:

- exercise~~exercising~~ self-discipline;
- accept~~accepting~~ such discipline as would be exercised by a kind, firm, and judicious parent;
- be~~being~~ courteous and demonstrate inclusiveness and equity toward ~~to~~ fellow students;
- be~~pupils and~~ obedient and courteous to the principal and teachers; and

- ~~show being clean in person and in habits; and~~  
~~showing~~ respect for school property.
- c) Students must adhere to the TDSB Restrictions on Alcohol, Drug and Tobacco Use Policy (P095) ~~shall adhere to Board policy~~ that prohibits smoking, vaping, tobacco, the use of alcohol, and the non-medical use of drugs at all school activities and Excursions, whether they take place inside school or off school property ~~on excursions.~~
- d) Students participating in Excursions are expected to be prepared for the Excursion ~~excursion~~ and adhere to Excursion ~~excursion~~ expectations.
- e) Students participating in Excursions ~~will~~ follow the directions of teachers in charge of Excursion and other supervisors during the Excursion ~~excursion~~.
- f) Students participating in Excursions are

~~A student who participates in an excursion is~~ expected to complete, without penalty, any assignments and assessments missed in any subject due to the ~~Excursionexcursion~~, within a reasonable time after the ~~Excursionexcursion~~, as determined by the student's teachers.

### **E.5. For Parents/Guardians**

~~(a)—Parents/GuardiansAt the beginning of the school year, all custodial parents shall be provided with a copy of Parents'/Guardians' Responsibility for Excursions (see Appendix F).~~

- a) ~~Custodial parents~~ of students under the age of 18 who wish their child to participate in an ~~Excursionexcursion~~ are required to provide ~~permissionconsent~~ for each ~~Excursionexcursion~~ by completing ~~and returning to the teacher a~~ Form ~~511511C: Parent/Guardian Permission for Excursion (or the appropriate athletics form) either in hard copy or online via EMA.~~ Students aged 18 and over may ~~completesign~~ Form ~~511: Parent/Guardian Permission for Excursion511C~~ (or the appropriate athletics form) on their own behalf; however, it is strongly recommended that the ~~Parents/Guardianscustodial parents~~ of such students also ~~approvesign~~ the ~~Excursionform~~.
- b) Form ~~511511C: Parent/Guardian Permission for Excursion (or the appropriate athletics form)~~ will contain information about the nature and purpose of the ~~Excursionexcursion~~, any special risks or unusual activities, locations, dates and/or times, supervision, transportation arrangements, including mode of transport, use of volunteer drivers, costs, special clothing or equipment required, lunch or other food requirements, ~~and~~ any other ~~relevant~~ information that could have some bearing on whether the ~~Parents/Guardians (or students aged 18 and over)parent~~ would give or withhold ~~their permission, needconsent, a request~~ to update relevant medical or emergency information, and~~/or purchase a reminder that~~ student accident insurance~~.. may be purchased.~~
- c) Every effort ~~willshall~~ be made to advise ~~Parents/Guardianscustodial parents~~ of any volunteer drivers participating in the ~~Excursionexcursion~~, and to provide them with specific information about the volunteer drivers' vehicles. Every effort ~~willshall~~ be made to obtain written ~~Informed Consentinformed—consent~~ from the ~~Parents/Guardianscustodial parents~~ in order for the student to ride with a specific volunteer driver.
- d) ~~Parents/GuardiansCustodial parents~~ (or the student, where the student is aged 18 or over) who wish their child to participate in an ~~Excursionexcursion~~ are required to indicate if there is any medical/~~health~~ reason why their child ~~isshould~~ not ~~able to~~ participate in the ~~Excursionactivity~~, or that may lead ~~themhim/her~~ to require special attention during the ~~Excursionactivity~~.

~~At the beginning of the year, Parents/Guardians willFor overnight excursions only, parents shall~~ complete another Form ~~511511E: Medical Information for Excursions~~ authorizing the teacher in charge of the ~~Excursionexcursion~~ to seek and obtain medical care~~, if necessary, for the student, if necessary.~~ Overnight



~~interschool athletics~~Interschool Athletics excursions within the province ~~may~~ not require an additional Form ~~511511E~~: Medical Information to be completed. The student's

- e) ~~This~~ medical information will~~shall~~ be requested annually by the school, and ~~Parents/Guardians~~custodial parents are expected to provide the school with any relevant information or changes throughout the school year.
- f) ~~Parents/Guardians~~Custodial parents are expected to ensure that their child is prepared appropriately for the Excursion (e.g., bringing their own lunches and/or other times (if applicable), wear appropriate clothes, etc.)~~excursion~~.
- g) ~~Parents/Guardian~~Custodial parents are responsible for any applicable losses or costs should their child engage in misconduct, including a breach of the TDSB Caring and Board's Safe Schools Policy (P051), the Board Code of Conduct (PR585), or the school's Code of Behaviour, or for interschool athletics, the Code of Behaviour for Athletes (for interschool athletics) and other applicable TDSB policies and procedures. This could include lost deposit fees, costs for transportation home, or for damages resulting from misconduct.
- h) Parents/Guardians are responsible for the purchase of voluntary student accident insurance if necessary, and where required, mandatory travel insurance that includes cancellation coverage for school labour action.

## **E.6 For Superintendents of Education**

- a) The Superintendent of Education~~superintendent of education shall~~ make the decision to approve or not approve the following types of Excursions~~excursions~~:
  - i. Excursion~~excursions~~ beyond the Greater Toronto Area (as defined as the City of Toronto and the GTA and out of province; regional municipalities of Durham, Halton, Peel, and York);
  - ii. High-Care Activities and~~excursions involving high-care activities~~, those types of activities that involve increased risk and/or special safety considerations, ~~along with one or more of the following:~~
    - (A) ~~Overnight Excursions~~multiple risks, e.g., weather;
    - (B) ~~occur in or on the water (with the exception of timetabled physical education water activities, or outdoor education water activities scheduled by the Coordinator of Outdoor Education, or travel on large water vehicles used for public transportation); or~~
    - (C) ~~require special qualifications or certification for supervision; or~~
    - (D) ~~take place away from easy access to first aid.~~



~~\*Note: Higher Risk Sports as listed in the Physical Education Interschool Athletics Safety documents in interschool athletics are not considered to be high care activities/excursions. (See also Appendix C: High Care Activities.)~~

- iii. ~~overnight-excursions~~ (not including ~~Excursionexcursions~~ to TDSB Outdoor Education schools scheduled by the ~~Centrally Assigned PrincipalCoordinator~~ of Outdoor Education or overnight ~~Excursionexcursions~~ for ~~Ontario Federation of School Athletic Associations ("OFSAA")~~ secondary school athletics competitions which will be approved en masse);

~~Excursionsexcursions, including day trips to New York State;~~

- iv. ~~excursions~~ involving activities not listed in curricular and related safety documents;
- v. ~~Excursionexcursions~~ on days not identified as instructional days on the approved school year calendar or in the summer;

~~Excursionexcursions where Program Service Providers require the Parent/Guardian service provider requires the parent or the student to sign the Program Service Provider's waiver or release forms. Excursion forms for ;~~

~~External waivers must be acceptable to the Board's Legal Services Department and approved by the superintendent of education.~~

- vi. ~~One month prior to the excursion, principals should submit Form 511B: Request for Excursion Approval by Superintendent of Education's approval should submitted via EMA in accordance with the timelines set out in Sections E.1: For Principals, paragraph e) and E.2: For Teachers, paragraph d); accompanied by Form 511A: Request for Excursion Approval by Principal and Form 511C: Parent/Guardian Permission for Excursion. Note: Form 511B: Request for Excursion Approval by Superintendent must be submitted at least three months in advance for overnight excursions outside of the province, and at least six months in advance for overnight excursions outside of the country.~~
- b) The department's immediate supervisor/coordinator, the Superintendent of Education and the Executive Superintendent of Education, where applicable will ~~shall~~ make the decision to approve or not approve ~~TDSB~~Board-initiated activities, including interschool athletics events sanctioned by ~~TDSBthe Board~~, and ~~Excursionexcursions~~ to TDSB Outdoor Education schools scheduled by the ~~Centrally Assigned Principal Coordinator~~ of Outdoor Education, and ~~Excursionexcursions~~ organized by other ~~Centrally Assigned Coordinatorscentrally assigned coordinators~~.

## F. APPLICATION AND APPROVAL

- a) The permission from the Parents/Guardians should~~written informed consent of custodial parents shall~~ be obtained for all Excursions (See Section E.5: For Parents, paragraph a).~~excursions, using Form 511C: Parent/Guardian Permission for Excursion (or the appropriate athletics form).~~ Students aged 18 and over may ~~consent on their own behalf.~~ Where permission from Parents/Guardians~~the written informed consent of custodial parents~~ cannot be obtained for any reason, the student will~~shall~~ be excluded from the Excursion~~excursion~~ unless the principal, having regard to all the circumstances, determines that it is appropriate to allow the student to participate, has verbal permission from the Parent/Guardian~~custodial parents~~, and the activity is not a High-Care Activity, an Out-of-County Excursion and an Excursion~~high-care, overnight, or outside the Greater Toronto Area (GTA).~~

~~Parent information sessions when overnight excursions are planned, in order to outline the educational purpose, explain risks, and answer any questions, will ensure that informed consent is obtained.~~

~~In exceptional circumstances, excursion dates and times may change. The teacher shall make every effort to inform custodial parents of these changes.~~

- ~~(a) Custodial parents (or the student, where the student is aged 18 or over) who wish their child to participate in an excursion are required to indicate if there is any medical reason why their child should not participate in the activity, or which may lead him/her to require special attention during the activity.~~

~~For overnight excursions only, parents shall complete another Form 511E: Medical Information for Excursions authorizing the teacher in charge of the excursion to seek and obtain medical care, if necessary, for the student.~~

~~Overnight Interschool Athletics excursions within the province do not require an additional Form 511E: Medical Information to be completed.~~

- b) The principal will~~shall~~ make the decision to approve or not approve an Excursion~~any excursion~~ and participants, including those requiring additional approval from Superintendents of Education and the Executive Superintendent of Education, where applicable.~~superintendents of education.~~ The principal may wish to consult the Superintendent of Education, the Executive Superintendentsuperintendent of Education, where applicable or Centrally Assigned Coordinators~~education or centrally assigned teachers~~ before making a final decision~~or determination~~.
- c) Approval for TDSB~~Board~~-initiated activities and Excursions, including interschool athletics events sanctioned by TDSB, Excursionthe Board, and excursions to TDSB Outdoor Education schools scheduled by the Centrally Assigned PrincipalCoordinator of Outdoor Education, and Excursionsexcursions organized by other Centrally Assigned Coordinators should~~centrally assigned coordinators, shall~~ meet the requirements of this document, the Excursions~~Excursion~~-Policy (P033), except that the Superintendent of Education's~~superintendent~~ approval comes from the department's immediate supervisor. For these Excursionsexcursions (with the exception of the interschool athletics games/tournaments/events), theteachers' responsibilities of the teachers in charge of the Excursion are~~are~~ assumed by the centrally assigned

~~coordinator~~~~teachers~~ approved by the appropriate Superintendent of Education~~superintendent~~.

~~If the school requires exception to Approval for excursions to TDSB Outdoor Education schools as scheduled by the Coordinator of Outdoor Education is based on the regular booking process through the principal and involves only parent consent as received through Outdoor Education forms.~~

- (b) ~~Approval for excursions shall be required in accordance with the approval timelines for Excursions the exceptions levels as shown on Appendix A: Summary of Approval Requirements (excluding Physical Education/Athletics), Appendix B1: Summary of Approval Requirements for Physical Education Curricular Activities, Appendix B2: Summary of Approval Requirements for Intramural Activities, and Appendix B3: Summary of Approval Requirements for Interschool Athletics.~~
- d) ~~Exceptions~~ to these timelines will be considered on an individual basis at the Superintendentsuperintendent of Education'seducation's discretion, e.g., OFSAA competitions.
- e) No communication or monies willshall be collected from the Parents/Guardians or students and paid to Program Service Providers prior to the full approval of the Excursion by the principal and/or Superintendent of Education and the Executive Superintendentsuperintendent of Education, where applicable. For Student Tours, no monies will be paid to tour operators until all necessary approvals of the Excursions have been obtained. education.
- f) High-Care Activitiesseare—activities, and other activities not specifically listed in the curriculum or related safety documents, willshall be submitted to the Superintendentsuperintendent of Education and the Executive Superintendent of Education, where applicableeducation for approval prior to the school participation in. (See Appendix C: High-Care Activities, and other activities not specifically listed in the curriculum or related safety documents.)
- (e) ~~Any Excursionexcursion~~ or activity that is not approved by the principal as part of the school program willshall not be promoted or organized during school hours or in association whatsoever with the school or TDSBBoard. The ~~teachers willteacher shall~~ not initiate or become involved in Excursionsexcursions or activities that have not received the requisite approvals. Excursions
- g) ~~Board-organized by TDSB willexcursions shall~~ comply with the same standards of curricular relevance to particular students' individual programs as those Excursions organized by the school. Where applicable, principals and teachers are strongly encouraged to select approved excursion destinations found in the TDSB Excursion and Event Facilities Directoryexcursions organized by the school.

## **F.1 Excursions within Walking Distance of the School**

Principals have the option of using the: Form 511H: Walking Excursion Form – Immediate Community, to cover non-high-care curricular activities in instructional time within walking distance of the school. Appropriate supervision willshall be

approved on a case-by-case basis by the principal. Where possible, the teacher in charge of the Excursion within walking distance of the school and principal will notify Parents/Guardians of the activity, location, date, and time through newsletters, Web sites, or notes in school planners/agendas.

## **F.2 Series of Scheduled Events or Class Activities within the GTA**

- a) Where the Excursion involves a series of related or repeated events or activities to the same destination or for the same purpose, the teacher in charge of the Excursion will ~~shall~~ prepare a schedule of activities and obtain a single permission from Parents/Guardians ~~Form 511C: Parent/Guardian Permission for all related Excursion (or repeated events appropriate athletics form). For interschool athletics, a league/tournament schedule included with Form 511I or activities of the Excursion. 511J: Elementary/Secondary Interschool Athletics Tryout/Participation will suffice instead of 511C.~~

## **F.3 Unauthorized Non-Sanctioned Excursions**

- a) Certain excursion activities will not be approved, as they are deemed to be unsafe because of high or multiple risk factors. Examples of such activities include, but are not limited to: white water ~~whitewater~~ canoeing; white water ~~whitewater~~ rafting; parasailing; parachuting; gliding; hang gliding; bungee jumping; swimming parties at private or non-regulated pools, rivers, or lakes; and hot-air balloon rides; ~~scuba diving; and snorkelling.~~

**F. 4** ~~\*Note: Scuba diving and snorkelling can occur in a curricular class setting, with proper supervision ratios, under the direction of staff with appropriate qualifications/certifications.~~

- ~~(a) Trips that do not reflect the curriculum, or do not have a clear educational purpose, or cannot be adequately supervised, will not be considered or approved. Examples of such activities include but are not limited to trips to amusement parks that involve large groups of students on their own for the day to enjoy rides.~~

## **Commercial Excursions, Out-of-Country Excursions, and Student Tours**

- a) For any Commercial Excursions, Out ~~commercial excursion, out-of-Country Excursion~~ ~~country excursion~~, or Student Tours ~~student tour~~, the teacher in charge of the Commercial Excursion, Out-of-Country Excursion or Student Tour will ~~shall~~ complete and submit all requests for approval via EMA ~~to the principal a Form 511A: Request for Excursion Approval by Principal and, if appropriate, Form 511B: Request for Excursion Approval by Superintendent of Education~~ at least six (6) months prior to the Excursion ~~excursion~~.
- b) All Out-of-Country Excursions will require additional approval from the Executive Superintendent of Education. The principal and the teacher in charge of the

Excursion will check the Government of Canada Travel Advice and Advisories website (travel.gc.ca) for specific travel advice for the destination.

(a) ~~—The teacher in charge of the Commercial Excursion, Out-of-Country Excursion or Student Tour will~~The principal shall check with the Department of Foreign Affairs and International Trade Canada before proceeding with out-of-country excursions, and follow the recommendations of the Department. The Travel Information number to call for issues related to security and safety of travellers is 1-800-267-6788. The Web site is <www.voyage.gc.ca>.

b)c) ~~The teacher shall~~ report any changes to the excursion plan, including the time or point of departure, destination, or addresses, to the principals and/or the Superintendent of Education and the Executive Superintendent of Education, where applicable, as early as possible, in advance of the Excursion. Teachers should be aware that the Commercial Excursion operator has ultimate responsibility and decision making, including changes to the excursion plan.

e)d) Commercial Excursions, Outexcursions,—out-of-Country Excursionsecountry excursions, and Student Tours willstudent tours shall be arranged through a TDSB approved travel agent or tour operatortravel wholesaler duly registered under the Ontario Travel Industry Act, 2002. -

(b) ~~—The teacher in charge of the Commercial Excursion, Out-of-Country Excursion or Student Tour willshall~~ confirm that the travel agent or travel wholesaler is duly registered under the Ontario Travel Industry Act, 2002 (Refer to by obtaining its registration number, either directly from the travel agent or travel wholesaler, or by contacting the TDSB Excursion and Event Facilities Directory which contains a listing of all approved tour operators). Registrar appointed under the Travel Industry Act.

d)e) All travel agents must possess a licenselicence issued by the Travel Industry Council of Ontario (TICO). ~~Contact TICO to verify the authenticity of such licences. The phone number for TICO is 1-888-451-6426, and the Web site is <www.tico.on.ca>.~~

e)f) Staff and students participating in a Commercial Excursion, Out-of-Country Excursion or Student Tour mustcommercial excursion, out-of-country excursion or student tour shall be covered by an insurance package that includes the following types of insurance (where applicable):

- i. repatriation;
- ii. cancellation, including labour action; ;
- iii. accidental health; and
- iv. baggage.;

For Commercial Excursions, the provider will include the cost of their insurance in the excursion cost.

g) Except for unexpected health and unique unexpected family circumstances, such as a death in the family, students will not be able to leave a Commercial



Excursion during the excursion or to separately join or leave an excursion once underway, for example, a student may want to take separate transportation to meet their family who is on vacation or leave a vacation destination to join the school excursion. Any additional costs for transportation and supervision will be the responsibility of the student and may be covered under the travel insurance.

- h) Inviting or use of family members or friends as volunteers, or pets by staff, is not permitted. Students must be enrolled at the school at the time of excursion, to participate.
- i) Free time during an excursion is not recommended.
- j) Supervision ratios outlined in this Procedure should be followed on Commercial Excursions. Excess supervision and "free time" for supervisors should be avoided.
- k) When communicating the cost to parents/guardians, the cost of supervision/chaperones should be identified and communicated separately.
- l) Destinations involving beaches and swimming are to be avoided.
- m) Excursions that are initiated for a club performance, competition or game match and have a tour itinerary included, should be using a Commercial Excursion provider

~~\*—accident.~~

f)n) All excursion contracts with tour operators must contain the following clause: "Despite any other agreement, oral or written between the parties, the agent/tour operator will fully refund within 30 days all monies paid for hotel, flight, transportation, deposits, or other services if the principal of the school notifies the agent/tour operator that, in the opinion of Toronto District School~~the~~ Board, it is unsafe for the trip to proceed" unless other instructions are~~permission is~~ obtained from the Superintendent~~superintendent~~ of Education and the Executive Superintendent of Education, where applicable~~education~~, in which case the principal will~~Principal shall~~ make the students and their Parents/Guardians~~custodial parents~~ aware in writing in the on-Form 514C: Parent/Guardian Permission for Excursion form or online via EMA of the travel agency's or travel wholesaler's policy regarding refunds (See the TDSB Excursion and Event Facilities Directory, which contains a listing of tour operators approved by TDSB and their approved agreements).

~~(e) In the case where the deposit is non-refundable, Parents/Guardians~~the custodial parents/students~~ must agree that TDSB~~the Board~~ is not liable for the loss of deposit.~~

~~(d) Travel agencies or travel wholesalers who arrange for transportation shall ensure that such transportation complies with the Board insurance requirements. Tour companies shall contact the Board Transportation Department for information about the most recent insurance requirements.~~

g)o) All cheques for payment of students' travel costs should be made payable directly to the travel agency or travel wholesaler. Cheques should~~shall~~ not be

made payable to the teacher, the school, or TDSB. ~~the Board. However, the teacher may act as a conduit by collecting cheques and forwarding them to the travel agency or travel wholesaler.~~

~~(e) The teacher shall ensure that all notices and/or advertisements for the excursion identify the registered travel agent or travel wholesaler through whom travel arrangements are being made. All notices and/or advertisements shall also include the registration number of the travel agent or travel wholesaler.~~

~~(f) Where the teacher or other organizer fails to utilize a registered travel agent or travel wholesaler as required by this document, the protection afforded by the Compensation Fund will not be available in respect of the excursion.~~

## G. SUPERVISION

### G.1 Principles of Supervision

- a) All activities, facilities, and equipment have inherent risks, but the more effectively they are supervised, the safer they become.
- b) Supervisors should be aware of, and incorporate, the three categories of supervision set out in the OPASSE as set by the OPHEA, including: TDSB Physical Education/Outdoor Education Elementary and Secondary Curriculum/Interschool/Intramural Safety documents, including:
  - i. **Constant visual:** The supervisor is physically present, watching a single activity.
  - ii. **On-site/In-sight:** The supervisor is present, but not necessarily constantly viewing a single activity.
  - iii. **In-the-area:** The supervisor may be in one area while activity is taking place in another area nearby.
- c) Supervisors of athletics activities ~~will~~shall adhere to the designated level of ~~Supervision~~supervision as stipulated in the OPASSE. ~~appropriate safety documents. (See Appendix B1: Summary of Approval Requirements for Physical Education Curricular Activities, Appendix B2: Summary of Approval Requirements for Intramural Activities, and Appendix B3: Summary of Approval Requirements for Interschool Athletics and appropriate safety documents.)~~
- d) Supervisors should exercise their discretion in determining the appropriate level of ~~supervision~~ during an Excursion~~excursion~~, having regard to the following factors, among others:
  - i. the risk level of the activity;
  - ii. nature of the destination and/or travel;
  - iii. safety gear;
  - iv. the participants' special needs, skill level and abilities; competence and capacity;

- v. the participants' ages ~~and~~ maturity and experiences.
- e) Additional Supervision~~supervision~~ may be advisable where a student's exceptionality warrants.
- f) The Supervisor will~~supervisor shall~~ make students aware of the rules and safety considerations of any activities engaged in during the Excursion~~excursions~~. Rules may be modified to suit the age ~~and~~ physical abilities and exceptionalities of the students, but once made, they will~~shall~~ be strictly enforced. Students participating in the activities are expected to follow the rules for all activities, games, camps and events.
- g) Where appropriate, students and supervisors will~~shall~~ receive safety briefings regarding the use of emergency gear and emergency procedures in advance of the Excursion~~excursion~~.
- h) The supervisor will~~shall~~ be vigilant to prevent students~~one student~~ from pressuring each other~~another~~ into trying skills or activities for which they are~~he or she is~~ not ready and/or not able to perform.

(a)—G.2 The supervisor shall provide for a mandatory “buddy system” so that student numbers can be determined quickly in the event of an emergency.

#### **General Requirements    Guidelines Regarding Supervision**

a) To assist in excursion planning, excursion destinations must be selected from the TDSB Excursion and Event Facility Directory. Any activity or Excursion not listed in the Directory requires the approval of the Superintendent of Education and the Executive Superintendent of Education, where applicable.

(a)—When supervising students on Excursion~~excursions~~, teachers and other school administration must act as~~authorities shall comply with the common-law standard of care of a~~ reasonably careful or prudent parents (the common-law standard of care) ~~in these parent in the~~ circumstances.

a)b) In monitoring Excursions, TDSB, excursions, the Board and its staff, volunteers, authorized agents and representatives or any person permitted to provide Excursions will~~shall~~ comply with all statutory duties, including the duty to provide instruction and adequate accommodation for students, and ensure that every activity is conducted in accordance with the *Education Act* and related regulations, *Municipal Freedom of Information and Protection of Privacy Act*, R.S.O. 1990, Chapter M.56, the *Personal Health Information Protection Act*, 2004, S.O. 2004, Chapter 3, Schedule A, the *Child, Youth and Family Services Act*, S.O. 2017, Chapter 14, Sched.1 and other applicable legislation in the province of Ontario as well as TDSB policies and procedures, as may be amended from time to time.

b)c) In approving and supervising the Excursion~~excursions~~, principals will~~shall~~ comply with their statutory duties, including the duty to maintain proper order and



discipline in the school, give ~~assiduous~~ attention to the health, safety and comfort of the students, supervise instruction in the school, provide for the ~~Supervision~~supervision of any school activity authorized by ~~TDSB~~the school board, and report promptly any neglect of duty or infraction of school rules by a student to the ~~Parents/Guardian~~custodial parents.

~~e)d)~~ In planning and supervising ~~Excursion~~excursions, teachers ~~will~~shall comply with their statutory duties, including the duty to teach diligently and faithfully the classes or subjects assigned to the teacher by the principal; encourage students in the pursuit of learning; ~~encourage the highest regard for truth, justice, loyalty, and other virtues;~~ maintain proper order and discipline in the classroom and on the school ground; be responsible for effective instruction, training, and evaluation; ensure that all reasonable safety procedures are carried out; and ~~co--~~operate with the principal and other teachers to establish and maintain consistent disciplinary practices.

~~e)~~ School staff and principals should provide support to students to be able to participate in all Excursions, including activities requiring skills training, such as swimming. For students unable to attend certain Excursions or attend in a limited capacity, alternative activities should be planned, including assessments in accordance with the policies and practices described in the Ontario Ministry of Education policy documents: *Growing Success: Assessment, Evaluation, and Reporting in Ontario Schools – First Edition (Covering Grades 1 to 12)*, 2010 and *Growing Success – The Kindergarten Addendum: Assessment, Evaluation, and Reporting in Ontario Schools*, 2016.

~~(b) — Excursion volunteers will~~For non-athletic activities, the principal shall ensure that a sufficient number of teachers and adult supervisors accompany students on all excursions, in accordance with the minimum supervision ratios outlined in this document. (See Procedures, Section G.2 (p), for minimum supervision ratios.)

~~(c) — Where the excursion involves physical education or interschool athletics, the minimum supervision ratios for the specific activity must be obtained from the Physical Education/Outdoor Education Elementary and Secondary Curricular Safety documents, or the Physical Education Elementary and Secondary Interschool Athletics Safety documents, or the Physical Education Elementary and Secondary Intramural Safety documents, and the lowest ratio must be adhered to.~~

~~(d) — Efforts should be made to include adults or older students who speak the languages of some of the students, especially when recent arrivals are among the group. (See Procedures, Section G.2 (p), for minimum supervision ratios.)~~

~~(e) — The following individuals, provided they are 18 years of age or over, may be designated by the principal as supervisors on an excursion: principals, vice-principals, teachers, education staff, and parent and community volunteers.~~

~~(f) Elementary and middle schools may use senior high school students as assistants on excursions at the discretion of the principal, but these students must be used as assistants only, and not as excursion supervisors.~~

~~(g) For interschool athletics events, teachers, long term occasionals, principals, and vice principals employed by the TDSB, and retired TDSB teachers who are in good standing with the Ontario College of Teachers, are eligible to coach, subject to the approval of the principal.~~

~~Employees of the TDSB who are not teachers, and persons not employed by the TDSB (“community coaches”), may coach subject to the approval of the principal, provided they meet criteria for coaching eligibility and are under the direct supervision of a teacher/administrator (“staff supervisor”) who is employed by the TDSB.~~

~~d)f) Volunteers shall adhere to the TDSB policies, procedures and guidelines of the Board relating to volunteers, including obtaining criminal records checks. Volunteers who on a police reference check casual basis assist with a variety of activities (e.g., volunteer drivers) do not require a Criminal Records Check. Volunteers who accompany students on an Excursionexcursion for the purpose of assistance with Supervisionsupervision must have a valid police reference checkCriminal Records Check. (See Procedures, Section E.3: Volunteers, paragraph b).-)~~

~~(h) The principal shall designate one certified teacher from the school as the teacher in charge of the excursion.~~

~~The principal shall not designate an occasional teacher as the teacher in charge of an excursion, unless the occasional teacher is a long term occasional teacher, who, in the judgment of the principal, has sufficient knowledge about the students and the activity of the excursion.~~

~~e)g) All overnight Excursions willexcursions shall be supervised by at least two adults, representing the gender of the participating students, including at least one teacher from the school. For Excursionexcursions that include students from more than one school, and if it is not practical to have a teacher from each school, one teacher willshall be designated responsible.~~

~~(i) If an overnight excursion involves students of both genders, then adults of both genders shall supervise the excursion.~~

~~f)h) The principal and the teacher in charge of the Excursion willshall ensure that all precautions for the safety, comfort and supervision of participating students are taken, including an overnight safety plan.~~

~~g)i) The principal and the teacher in charge of the Excursion willshall ensure that the following minimum supervision ratios are met for each excursion:~~

Minimum Supervision Ratios (for a maximum group size of 30 students)		
Grade Levels	Day Excursions	Overnight Excursions
JK–K	Three adult supervisors per group	Not recommended

1–3	Two adult supervisors per group	Not recommended for Grade 1 (Special <del>approval</del> <del>permission</del> of <del>the Superintendent</del> <del>superintendent</del> of <del>Education</del> <del>education</del> required for Grades 2 or 3; <u>If approved</u> , four adult supervisors per group)
4–8	Two adult supervisors per group	Two adult supervisors per group
9– <del>12</del> <del>2</del>	One adult supervisor per group	Two adult supervisors per group

~~(j) — The Superintendentprincipal may grant exceptions to these supervision ratios only for excursions within walking distance of Education the school.~~

~~h)j) The superintendent of education may grant other exceptions to the supervision ratios and standards at the Superintendent of Education's discretion. -~~

~~i)k) Relevant considerations for the principal or the Superintendentssuperintendent of Educationeducation in exercising his or her discretion to increase Supervisionsupervision ratios, in the chart above or in the OPASSE as set by the OPHEArelevant Physical Education Safety Document, may depend on the following factors (the list is not limited to the below factors)::~~

- i. the nature of certain destinations;
- ii. the nature of the Excursion or activity;
- iii. whether accommodations are required for students with special needs and exceptionalities who will be participating in the Excursion or activity. The accommodations are to be considered so that excursion participants are not disadvantaged or discriminated against during Excursions on the basis of the prohibited grounds of discrimination, as identified in the Human Rights Code, R.S.O. 1990, c. H.19, the Ontarians with Disabilities Act, 2001, S.O. 2001, c. 32 and the Accessibility for Ontarians with Disabilities Act, 2005, S.O. 2005, c. 11 and their respective regulations (See TDSB Accessibility Policy (P069).

~~(i) — whether students with special needs and exceptionalities will be participating;~~

~~iii-iv.~~ the competence and capacity of the students involved;

~~iv-v.~~ the age of the students;

~~v-vi.~~ whether athletic teams are involved;

~~vi-vii.~~ whether Excursionsexcursions are TDSBBoard initiated and/or involve students from different schools, e.g., Student Environmental Network or a, music camp; ~~etc.~~;

~~vii-viii.~~ whether Excursionsexcursions to TDSB Outdoor Education Day Centresday-centres where additional Supervisionsupervision is provided would otherwise be cancelled;

~~viii-ix.~~ whether the activities require supervisors to have specific training and/or certification in order to supervise and instruct the Excursion or activity. Examples of these Excursionsactivities include but are not limited to activities such as canoeing, kayaking, sailing, swimming, Dragonboatdragonboat racing, wall-ascending lines, bouldering, challenge courses climbing, skiing, snow tubing, camping, horseback riding, and rock climbing (–See the OPESG as set byPhysical Education/ Outdoor Education Elementary and Secondary Curricular Safety documents, or the OPHEAPhysical Education Elementary and Secondary Interschol Athletics Safety documents, or the Physical Education Elementary and Secondary Intramural Safety documents for complete listings and certification requirements).

### **G.3 Excursions Involving Water-Based Activities**

- a) When attending any water-based Excursions, all students must pass the required swim tests as set out by the Ontario Physical Health Education Association (OPHEA) in the Ontario Physical Activity Safety Standards Education (OPASSE).
- b) All Excursions involving water-based activities will only be approved after the principal has reviewed documentation showing that only those students who passed the appropriate test(s) will be participating in water-based activities during the Excursion.
- c) **First Pre-Excursion Swim Test.** All students participating in a pre-Excursion swim test will be given the results of their pre-Excursion swim test. All Parents/Guardians of children taking part in future Excursions that involve swimming, canoeing/kayaking or any other water-based activities will receive their child's/children's pre-Excursion swim test results prior to the Excursion. Parents/Guardians will know that if their child is going on an Excursion involving water-based activities and if their child has passed a pre-Excursion swim test.
- d) **Second Swim Test.** All students participating in water-based activities must pass a second swim test at a third-party facility. It will be supervised by camp lifeguards and TDSB teachers as per Ontario Camp Association (OCA) guidelines. If students fail the second swim test, they will not participate in any water-based activities during the Excursion. Any student who has failed their second swim test will not be allowed to participate in any water-based activities and will be provided with alternative land-based activities.
- e) All students involved in water-based activities must be wearing a personal floatation device at all times outside designated, supervised, swim areas; no exceptions will be made.
- f) In accordance with the OPHEA requirements, principals and teachers in charge of the Excursion will ensure that the correct number of lifeguards (National Lifeguard Certified) will be present when students are in the water during the Excursion.

- g) All supervisory staff overseeing water-based activities must have current certifications as per Ontario Teachers Aquatic Standard (OTAS). A copy of certification will be provided to the principal prior to the Excursion.

#### **G.4 Non-Athletic Related Excursions**

- a) For non-athletic activities, the principal will ensure that a sufficient number of teachers and adult supervisors accompany students on all Excursions, in accordance with the minimum supervision ratios outlined in this document. (See Section G.2: General Requirements, paragraph j) for minimum Supervision ratios.)
- b) Where the Excursion involves physical education or interschool athletics, the minimum supervision ratios for the specific activity must be obtained from the OPASSE as set by the OPHEA, and the lowest ratio must be adhered to.
- c) The following individuals may be designated by the principal as additional supervisors on an Excursion: principals, vice-principals, teachers, education staff, Parent/Guardian and community volunteers (provided they are 18 years of age or over).
- d) For interschool athletics events, teachers, long-term occasional teachers, principals, and vice-principals employed by the TDSB, and retired TDSB teachers who are in good standing with the Ontario College of Teachers, are eligible to coach, subject to the approval and discretion of the principal.
- e) For overnight excursion, whereby the teacher is adding a tour to the itinerary, refer to Commercial Excursions.
- f) TDSB employees who are not teachers, and individuals who are not employed by the TDSB ("community coaches"), may coach subject to the approval and discretion of the principal, provided community coaches meet criteria for coaching eligibility, are under the direct supervision of a teacher/administrator ("staff supervisor") who is employed by the TDSB, obtain police reference checks in accordance with the TDSB Employee Services Protocol: Police Reference Checks (SR23) and adhere to all applicable TDSB policies, procedures and guidelines

#### **H. WAIVERS AND ADDITIONAL FORMS**

From time to time, Program Service Providers~~organizations~~ may require the excursion participants ~~and/or their Parents/Guardians in an excursion~~ to complete a waiver and/or release forms prior to participating in the Excursions. Where a Program Service Provider~~excursion activities. Generally speaking, these forms contain legal language releasing the organization and its officers, directors, agents, and employees from any and all liability. Where an organization~~ requests that a waiver and/or release form or any other forms from a Program Service Provider be completed and~~be~~ signed, the teacher in charge of the Excursion ~~will this excursion shall~~ submit the forms to the Superintendent~~superintendent~~ of Education~~education~~, prior to the commencement of the Excursion~~excursion~~, for his or her approval. Waivers or any other forms from Program

~~Service Providers~~~~External waivers~~ must be acceptable to the ~~TDSB Board's~~ Legal Services and/or Risk Management Department and approved by the ~~Superintendents~~~~superintendent~~ of ~~Education~~ prior to ~~education~~.

## ~~A. BILLETING~~

- ~~(a) The principal shall approve, in advance, any billeting arrangements. Billeting students has been used in the commencement past as a means of the Excursion. Principals will reducing costs for excursions, as well as allowing students to meet new people in different cultural situations.~~
- a) ~~The teacher in charge of an excursion involving billeting shall make every effort to ensure that students are entering a safe and secure environment, for example, through consultation with the principal of the hosting school staff and teachers in charge of the Excursion are selecting approved excursion forms and approved Program Service Providers found in the TDSB Excursion and Event Facilities Directory. and through host parent meetings.~~
- ~~(b) Every effort shall be made to billet students in groups of two.~~
- ~~(c) The teacher in charge shall include information about the accommodation and/or billeting arrangements on Form 511C: Parent/Guardian Permission for Excursion, including:~~
  - ~~▪ the name of the individual with whom the student will be billeted;~~
  - ~~▪ contact information, including the telephone number and address, of the individual with whom the student will be billeted;~~
  - ~~▪ whether any other students will be billeted with the student; and~~
  - ~~▪ any other pertinent information regarding the individual with whom the student will be billeted.~~
- ~~(d) Individuals billeting TDSB students must have children attending in the school that is hosting or sponsoring the event. Exceptions must be approved by the superintendent of education.~~

## ~~I. TRANSPORTATION — (Reference to TDSB Board Policy P.020 TRA: Transportation of Students Policy (P020) )~~

- a) ~~Acceptable means of transportation for students participating in Excursionsexcursions may include:~~
  - ~~buses and vans owned or hired by the TDSB;~~
  - ~~transit authority and licensed government and commercial public transportation, including carriers, vehicles, and vessels;~~
  - ~~authorized, commercial, transportation provider;~~
    - ~~▪ taxis;~~
    - ~~▪ privately owned vehicles;~~
  - ~~other forms of transportation approved by the Superintendentsuperintendent of Educationeducation.~~



- Personal automobile use of volunteer or staff drivers and privately owned vehicles should be a choice of last resort.
- b) Students may make alternate travel arrangements to and from an Excursion~~excursion~~ with approval from the teacher in charge of the Excursion and prior written permission from the Parents/Guardian~~custodial parents~~.
- c) For public transportation, students ~~Students~~ should receive full safety briefings from school staff and/or authorized TDSB representatives regarding the use of emergency gear and emergency procedures prior to, ~~possibly from the transportation provider, in advance of the~~ Excursion or boarding~~excursion~~.
- d) Insurance information ~~will~~shall be obtained for vehicles used in the Excursion~~excursion~~, regardless of the mode of transportation (i.e., commercial or volunteer).
- e) For volunteer driver's requirements, see Section E.1: For Principals, paragraph n) and Section E.3: For Volunteers, paragraph d).
- (a) — I.1 ~~The principal shall ensure that a signed Form 511C: Parent/Guardian Permission for Excursion (or appropriate athletic form), including specific information about the volunteer drivers and the vehicles being used, is obtained for each student for the excursion. If the excursion involves the use of volunteer drivers, these volunteers are required to complete Form 511F: Principal Authorization for Volunteer Drivers. The principal shall make the decision to approve or not approve this form.~~
- (b) — ~~Consent should be obtained for each excursion for students to travel in specified private vehicles with specific volunteer drivers.~~

### **Boat and Air Transportation**

- a) For public transportation, both in-country and out of country, commercial boats or ships, vessel inspections are not required. For non-public transportation boats or ships, such as one exclusively offering tours or host a school event, vessel certification is required. In Ontario, refer to the TDSB Excursion and Event Facilities Director for approved Program Service Providers. If the transportation is part of a tour, the tour operator is responsible for confirming the vessel certification and safety plans.
- (a) — Unless a Program Service Provider is a public transportation provider, for Excursions ~~Whenever a commercial boat or ship not operated by a government agency is included as part of an excursion within Ontario, the teacher shall contact Marine Safety, Transport Canada, Ontario Region, 416-954-8926, to determine if the vessel has passed inspection for the current year. This does not apply to the Toronto Island Ferry.~~
- a)b) For excursions involving boating activities, all the boat operator shall be notified of the number of students under 40 kilograms, as these students will require a lifejacket. ~~child's lifejacket. The excursion shall not proceed if the boat does not have~~

~~the requisite number of proper fitting lifejackets for all adults and students, as well as any other necessary lifesaving equipment.~~

~~(b)—**I.2** Air travel and sightseeing must be taken only on planes licensed to operate commercial passenger and sightseeing flights. The pilot must be commercially licensed.~~

### **Use of Buses and Vans**

- a) The preferred method of transportation for students on ~~Excursions~~excursions is by buses or vans owned and ~~/~~or hired, with operator, by the TDSB.
- b) Bus carriers ~~should~~shall be selected from the list of pre-approved carriers prepared and issued annually by the TDSB Transportation Department.
- c) A teacher from the school or teacher in charge of the Excursion will~~shall~~ supervise students on a bus or van during all school-organized ~~Excursions, excursions.~~ The principal may delegate to a team coach or other responsible adult the responsibility of ~~Supervision~~supervision of students on a bus or van.
- d) In situations where a bus or vehicle owned or hired by the TDSB is used to transport students during an ~~Excursion~~excursion, the teacher in charge of the Excursion will~~shall~~ make and carry a list of the students, along with the Student Excursion Report, ~~(Trillium),~~ on each vehicle. Where possible, the list should include the licence/identification number of each vehicle. Where the ~~activity~~excursion is an Out-of-Country Excursion~~province or includes high-care activities,~~ then applicable ~~travel insurance~~health information (including insurers' phone number) should be carried by the teacher in charge of the Excursion.
- e) When the ~~Excursion~~excursion goes beyond the GTA if travelling by bus, the teacher in charge of the Excursion will~~shall~~ also carry a seating plan.

### **I.3 Student Tour Companies**

- a) Student Tour companies must be approved by the TDSB Purchasing Department and if the companies that utilize their own carriers, they must~~shall~~ meet the TDSB insurance requirements to be considered for~~pre-approved~~ carriers. Tour companies should be instructed to contact the TDSB ~~Purchasing~~Transportation Department for the most recent TDSB insurance requirements.

### **I.4 Volunteer Drivers Using Vehicles or Another Licensed Automobile**

- a) Volunteer drivers are individuals, authorized by the principal, who have agreed to transport students using their own or another licensed automobile that meets the requirements of the TDSB, as outlined on the Form 511F: Principal Authorization for Volunteer Drivers (See Section E.1: For Principals, paragraph n) and Section E.3: For Volunteers, paragraph d). The teacher in charge of the ~~Excursion~~excursion is expected to ensure that these forms are completed by volunteer drivers and submitted to the ~~school~~ principal for review. ~~authorization.~~



~~(a) Volunteer drivers shall hold a minimum of a valid Ontario Class G2 or better licence.~~

b) **Child Seating and Restraint Systems –(Car Seats, Booster Seats and Seatbelts)**

i. Child seating and restraint systems are mandatory as follows when transportation is not by public transportation~~by minivan, car or taxi~~:

- Child Car Seats (forward-facing) are to be used for children weighing between 9 and 18 kg (20 to 40 lbs). ~~}~~
- Booster Seats are to be used for children weighing from 18 to 36 kg (40 to 80 lbs), less than 145 cm (4 feet, 9 inches) tall and up to 8 years old.– Booster seats must be used with both the lap and shoulder belt combination.
- Seatbelts are designed for adults and older children. Highway Traffic Act, R.S.O. 1990, c. H.8 allows a child to use a seatbelt alone when any one of the following occurs: (1) child turns 8 years old, or (2) child weighs 36 kg (80 lb.), or (3) child is 145 cm (4 ft. 9 in.) tall or more.

Drivers can be punished for not using proper child car restraints in vehicles. The principals and drivers are responsible for ensuring passengers under age sixteen (16) are properly secured. Principals ~~should~~may not authorize volunteer drivers to transportfor these students unless each student has the appropriate child seating.

ii. Where this is not possible, alternative transportation such as public transportation~~TTC~~ or school bus should be used.

iii. The Ontario government introduced Bill 73, Highway Traffic Statute Law Amendment Act (Child and Youth Safety) 2004, which was passed into law on December 9, 2004 and went into effect on September 1, 2005. Bill 73 requires the mandatory and proper use of child car restraints – including car seats and booster seats. In Ontario, all drivers (including visiting drivers) must ensure that children under the age of 16 occupy a seating position and wear the seatbelt assembly, and that children under the age of 8 are properly secured in the correct child car seat or booster seat according to Ontario's requirements (Ontario Ministry of Transportation website at <http://www.mto.gov.on.ca/english/safety/choose-car-seat.shtml>).

~~(b) Volunteer driversSeatbelts –When a child meets any one of the following criteria, a seatbelt alone may be used:~~

- ~~• eight years of age and older;~~
- ~~• 36 kg (80 lbs) or more;~~
- ~~• 145 cm (4 feet, 9 inches) or taller.~~

Child Seating and Restraint Systems Update: June 2005

The Ontario government's Bill 73, *An Act to Enhance the Safety of Children and Youth on Ontario's Roads*, was passed on December 6, 2004. Police officers will begin charging individuals as of September 2005. The legislation applies to private vehicles. Therefore, school principals must ensure that if students are being transported in a private vehicle and meet the requirements in section J.4(c)(i), that the legislation is followed. The Ministry of Transportation has not yet clarified issues of funding for this initiative in school boards. Requirements for taxis and other commercial vehicles is also to be determined.

(c) — Student Driver Using Private Vehicle

- (i) — ~~Student drivers using a private vehicle to drive themselves shall hold a valid Ontario Class G2 or better Licence.~~

~~Student drivers shall have a valid Ontario Motor Vehicle Ownership certified in their own name, or a signed consent from the owner of the vehicle, in order to use private vehicles for their own personal transportation for an excursion. Such permission should be included in Form 511C: Parent/Guardian Permission for Excursion (or the appropriate athletics form).~~

~~A student at the school may apply to volunteer as a driver, provided the student holds a valid Ontario Class G2 or better licence and carries the necessary insurance (see Procedures Section J.4 (d) ii):~~

- ~~\* — Motor Vehicle Liability, with a limited on liability of at least \$1 million;~~
- ~~\* — Accident Benefit;~~
- ~~\* — Uninsured Automobile.~~

~~A student volunteer driver shall complete the Form 511F: Principal Authorization for Volunteer Drivers and submit it to the teacher for principal approval in advance of the excursion.~~

~~The principal, in his or her discretion, may refuse to permit a student to act as a volunteer driver if, in the opinion of the principal, it would be unsafe or otherwise inappropriate.~~

~~\*Note: All drivers must comply with any new Government regulations.~~

~~(d) — Personal Automobile Insurance Coverage~~

~~(i) — Volunteers and TDSB employees who use their personal vehicles for transporting students to Excursions and school activities should advise their insurance carrier of these uses of their vehicles. ;~~

~~(ii) — Ontario legislation makes automobile insurance compulsory in the Province of Ontario. Volunteer drivers shouldshall have the following current motor vehicle liability insurance coverage on any vehicle used to transport students for the excursion:~~

c) ~~Motor Vehicle Liability, with a limited on liability of at least \$1 million on any vehicle used to transport students for the Excursion (See Section E.1: For Principals, paragraph n) and Section E.3: For Volunteers, paragraph d) for more details).;~~

~~\* — Accident Benefit;~~

~~\* — Uninsured Automobile.~~

d) Ontario legislation makes the owner's insurance primary coverage in the event of an accident, — in other words, the insurance carried on the vehicle responds first. If a vehicle that is not owned by the TDSB is being operated by a volunteer or any other TDSB employee for approved school activities or Excursions, the TDSB Board's non-owned automobile insurance endorsement will respond to third-party liability claims in excess of the owner's insurance limit up to a total combined limit as stated in the TDSB non-owned auto policy.

e) There is no coverage provided by the TDSB's insurance for damage to a volunteer's or employee's vehicle while they are being operated for TDSB activities.

~~(i) — I.5 According to provincial legislation, passengers who are injured would recover accident benefits coverage from their own or a parent's automobile policy. In the absence of a personal or family automobile policy, the passenger would then be eligible to recover benefits from the insurance policy covering the vehicle in which he or she was riding.~~

**Educational Staff Renting Vehicles**

a) Vehicles being rented by educational staff for Excursions willTDSB excursions shall be rented in the name of the TDSB and only as a last resort.;

~~(a) — The full insurance coverage offered by the rental company is to be purchased, including the motor vehicle liability;~~

b) ~~Motor Vehicle Liability, with a limited on liability of at least \$24,000,000.;~~

~~\* — Accident Benefit;~~

~~\* — Uninsured Automobile.~~

c) The driver willshall provide proof of a licence required to operate the specified vehicle rented.

d) Booster Seats. — Section IJ.4 (c) above also applies to educational staff renting vehicles.

**I.6 Educational Staff Using TDSB Board Vehicles**

- a) The driver ~~will~~shall provide proof of a licence required to operate the specified vehicle being used and have three-year automobile accident free history.
- b) Booster Seats. — Section ~~I~~J.4 (c) above also applies to educational staff using TDSB Board vehicles.

**I.7 Student Identification for Transport**

- a) All students are expected to carry with them identification, including home, emergency, and school telephone numbers. When travelling on public transit, students in Grades K–6 should also carry the address of the excursion venue and the correct transit stop.
- b) In situations where a bus or vehicle owned or hired by the TDSB is used to transport students during an ~~Excursion~~excursion, the teacher in charge of the Excursion ~~will~~shall make and carry a list of the students along with the Student Excursion Report (~~Trillium~~) on each vehicle. Where possible, the list should include the licence/identification number of each vehicle. Where the ~~Excursion~~excursion is out-of-province or includes High-Care Activities~~high-care activities~~, then applicable health information (including insurers' phone number) should also be carried.
- c) When the ~~Excursion~~excursion goes beyond the GTA if travelling by bus, the teacher in charge of the Excursion ~~will~~shall also carry a seating plan.
- d) The principal ~~will~~shall retain a copy of the above-mentioned lists as well as other related excursion forms in hard copy or in digital format in the school. The teacher in charge of the ~~Excursion~~excursion ~~will~~shall also carry a copy of these lists. Finally, the supervisor of each bus or vehicle unit ~~will~~shall carry a copy of these lists.

**I.8 Travel in Inclement Weather**

- a) From time to time, weather conditions may make travel hazardous, particularly on the highway. ~~For information on road conditions, call 416-235-4686; for information on weather conditions, call 416-661-0123; or view Environment Canada's Official Canadian Text Forecasts for Southern Ontario at <weatheroffice.ec.gc.ca/forecast/textforecast\_e.html?Bulletin=fpcn11.cwto>, or the Weather Network Web site at <www.theweathernetwork.com>, or by viewing the Weather Network channel.~~
- b) The ~~principal~~teacher in charge has the ultimate responsibility for the safety of the students, and ~~will~~shall make a decision in these circumstances whether to proceed or not proceed with the Excursion. ~~excursion. Where possible, a check must be made for travel or weather advisories.~~

- c) The ~~school~~TDSB will cover any costs associated with the cancellation or delay of the Excursion~~excursion~~.

### **I.9 Transportation of Excursion-Related Equipment and Supplies**

- a) The transportation of Excursion~~excursion~~-related equipment and supplies ~~will~~shall be done in accordance with the safety requirements of the approved carrier.\_

### **I.10 Public Transportation**

- a) Public transportation may be an acceptable alternative to a TDSB bus.\_
- (a) ~~The Toronto Transit Commission (TTC) may provide special supervision for school classes using their services. To inquire about or arrange for such special supervision, the teacher in charge should contact the Toronto Transit Commission Public Relations Office at least one week in advance of the excursion, and advise them of:~~
- ~~\* the date and time of the excursion;~~
  - ~~\* the origin, destination, and route; and~~
  - ~~\* the number of students in the group and the grade levels involved.~~
- (b) ~~TTC special supervision can normally only be arranged during off-peak hours.~~
- b) Student groups larger than 35–40 should stagger their travel times or make alternative travel arrangements.
- c) If the student group includes students who do not have public transportation~~TTC~~ student identification cards, the teacher in charge should contact the service provider~~TTC~~ to obtain a group identification card for the Excursion, ~~if available~~excursion.
- d) When public transportation~~TTC~~ services are used, an adult supervisor ~~will~~shall travel with all students, K–8 inclusive, to the excursion location, and return to the school\_. Students ~~in at the~~ Grades 7 and, 8, ~~levels~~ may be dismissed from the venue, or the appropriate public transportation~~transit~~ stop, provided prior written informed consent from their Parents/Guardians~~custodial parents~~ has been obtained.
- e) When public transportation~~TTC~~ services are used, students in Grades 9\_, 10, 11, ~~or~~ 12 may travel to and from the excursion venue without adult supervision, provided prior written informed consent from their Parents/Guardians~~custodial parents~~ has been obtained. ~~When travelling without adult supervision, students should be encouraged to travel with a “buddy.” When students are travelling together in a group of eight or more, they should be accompanied by an adult supervisor where possible~~
- ~~\*Note: principals always have the option to require adult supervision for student travel on the TTC.~~
- f) Principals ~~will~~shall make individual assessments of the students to ensure that travel arrangements are appropriate in any given circumstance.\_

## J. EXCURSION COSTS

- a) In accordance with principles of the Equity Policy (P037) and TDSB's commitments to equity, inclusion, fairness, diversity and acceptance, every effort will be made to ensure that excursion opportunities are communicated in multiple, accessible formats and that students are provided with equitable access to excursion opportunities.
- b) No monies for Excursions will be collected and paid to Program Service Providers before the full approval of the principal and/or approval the Superintendent of Education and the Executive Superintendent of Education, where applicable are obtained.
  - (c) ~~When using the TTC services, special care should be taken to ensure that all students board and exit at the correct bus or subway stop.~~
  - (d) ~~All students should be instructed on how to get help from TTC personnel, and K-6 students should have the school telephone number and the correct stops and the excursion venue written on a piece of paper in their pocket.~~

## B. FUNDING AND EXCURSION COSTS

- a)c) Teachers in charge of the Excursion will ~~shall~~ inform Parents/Guardian ~~custodial parents~~ of the cost of the Excursion and other financial arrangements in the excursion on Form 511C: Parent/Guardian Permission for Excursion form. For out-of-province and Out-of-Country Excursions ~~international excursions~~, teachers in charge of the Excursion will also ~~shall~~ inform Parents/Guardian ~~custodial parents~~ of detailed costs, deposits, refunds, and non-refundable costs associated with the excursion on Form 511C: Parent/Guardian Permission for Excursion.
  - (a) ~~No monies shall be collected prior to the full approval of the principal and/or superintendent of education.~~
- b)d) Principals will ~~shall~~ inform Parents/Guardian ~~custodial parents~~ that Parents/Guardian ~~they~~ will be responsible for any applicable losses or costs associated with ~~should~~ their child being engaged ~~engage~~ in misconduct while on the Excursion ~~excursion~~, including damages and/or return transportation fare, ~~by distributing each September the Parents'/Guardians' Responsibilities for Excursions (see Appendix F).~~ Principals will also ~~shall~~ inform Parents/Guardian ~~custodial parents~~ that Parents/Guardian ~~they~~ will be responsible for any non-refundable deposit associated with the activity should TDSB ~~the Board~~ cancel the Excursion ~~this excursion~~ in the interest of student safety or for any other emergency.
  - (b) ~~Every effort should be made to ensure that excursions are affordable to students. No student shall be excluded as a result of financial inability to pay.~~
  - (c) ~~The principal shall make the decision to approve or not approve any excursion costs.~~
  - (d) ~~Costs for excursions, including fundraising, will be reviewed annually with input from the School Council.~~



- e)e) Supervision costs may be paid by Parents/Guardians/students up to the required ratios of Supervision (See section G.2 paragraph j).~~supervision.~~ Above the required ratio of supervision, additional costs ~~will~~shall be shared by all participating staff.

## K. RISK MANAGEMENT

In referencing and selecting Program Service Providers from the TDSB Excursion and Event Facilities Directory, school staff will have access to approved vendors and related risk management information.

K.1 ~~The following questions relating to high-care activities and risk management should be asked when planning excursions:~~

- ~~(i) — Risk Avoidance: Do we need to do the activity?~~
- ~~(ii) — Risk Assessment: If we do it, is it foreseeable that someone can be injured?~~
- ~~(iii) — Risk Assessment: What is the probability of injury?~~
- ~~(iv) — Risk Reduction: What can we do to prevent an injury?~~
- ~~(v) — What is the probable severity of the most likely injury?~~

### Contingency Planning (Form 511G: Formal Contingency Plan)

The principal ~~will~~shall ensure that contingency planning is part of every Excursion~~excursion.~~ This includes anticipated risks, potential emergencies, and response to these emergencies. ~~Wherever possible, supervisors on an excursion shall carry copies of the emergency procedures checklists for accidents and missing students (see Appendices H1 and H2 respectively).~~

- a) The principal and the teacher in charge of the Excursion ~~will~~shall ensure that an appropriate formal contingency plan (Form 511G: Formal Contingency Plan) is part of every High-Care Activity~~high-care~~ or overnight Excursion~~excursion~~ (except excursions to TDSB~~Board~~ Outdoor Education schools scheduled by the Centrally Assigned Principal~~Coordinator~~ of Outdoor Education, and overnight interschool athletics Excursions). ~~excursions). A copy of this Form 511G: Formal Contingency Plan should be attached to Form 511B: Request for Superintendent Approval.~~
  - ~~(a) — All excursion destinations in the Excursion and Event Facility's Directory have safety plan. Appropriate~~A copy of the formal contingency plans should include the plan is to be taken on the high-care or overnight excursion destination plan as well as~~a~~and a copy left with the principal. Contingency plans shall be formulated for each aspect of the high-care or overnight excursion, and shall be shared with parents, students, and the transportation provider.
- b) ~~Contingency plans should~~ consider the degree of isolation of the Excursion~~event.~~ An appropriate contingency plan should include the recognition of potential emergencies, training and preparation, security plans for overnight accommodations, response during the emergency, and communication plans. An appropriate contingency plan should ensure that those individuals supervising

the ~~Excursion event~~ are familiar with relevant TDSB policies and procedures and other applicable policies, procedures and protocols. ~~Use Form 511G: Formal Contingency Plan.~~

- c) During an emergency, the supervisor ~~will~~shall take care of the immediate needs of the participants involved in the incident, prevent the situation from escalating, and follow the steps below:
- i. Assess the situation to determine if immediate medical care is required or if assistance is required.
  - ii. Account for all participants and remove participants from further danger. A supervisor ~~will~~shall take charge of ~~the~~this group, ~~provide.~~ Provide comfort and necessary information to all involved.
  - ~~ii.~~iii. Call 911 or necessary emergency services for assistance, depending on area/location.
  - ~~iii.~~iv. Arrange for the administration of first aid or CPR as required.
    - ~~(i) Call 911 or necessary emergency services for assistance, depending on area (e.g., OPP).~~
  - ~~iv.~~v. Call the school emergency contact. Contingency planning should be coordinated with the school emergency coordinator.
  - ~~v.~~vi. In life-threatening situations, call the school contingency contact after alerting emergency services.
    - ~~(b) Considerations in reporting an emergency:~~
      - ~~(i) State name of school/site.~~
- ~~State name of caller.~~  
~~Describe the nature of the problem.~~  
~~Describe type and extent of injury.~~  
~~How many participants are injured?~~  
~~Describe the action taken.~~  
~~Specify needs (i.e., medical, transportation, supervision).~~  
~~Transport participants to medical care as quickly as possible.~~
- d) Staff member or adult supervisor should accompany injured participant to the hospital. Contact principal from hospital and update on the participant's condition.
- e) The principal ~~will~~shall arrange a convenient meeting area for ~~Parents/Guardians~~parents when an emergency arises, to allow for privacy, fact finding, and exchange of information.
- f) During an emergency, where possible, the teacher in charge of the Excursion will keep or arrange for an ongoing written log of events and times to be kept.

## K.2 Medical and Emergency Procedures



- (a) ~~At the beginning of the school year, principals will ensure that Form 511511E: Medical Information for Excursions has been obtained from all Parents/Guardians parents, authorizing the teacher in charge of the Excursion excursion to seek and obtain medical care, if necessary, for the student (See Section E.5 For Parents/Guardians, paragraph e) for more details).~~ **Principals must ensure that the medical information is entered into Trillium. The entering of this information into Trillium is a top priority, as this is a health and safety issue.**
- (b) ~~To determine whether a student participates in an excursion, the principal shall take into consideration:~~
  - (i) ~~if a student has a serious medical condition; and/or~~
  - (ii) ~~the administration of medication is too complicated; or~~
- a) ~~a student has engaged in serious misconduct, including breach of the school Code of Behaviour;~~
  - (e) ~~Students may attend school and school-based Excursion excursions, even if they do not have health coverage. (See Appendix I: Health Coverage.)~~
  - (d) ~~Principals should consider are advised to ensure the following in terms of health:~~
    - (i) ~~that staff and volunteer organizers are aware of participating students who may suffer anaphylactic reactions and ensure that the individual plans and epinephrine and cellphones are available, if required, in accordance with operational procedure PR.563: Anaphylaxis;~~
    - (ii) ~~that best efforts are made to obtain accurate information on the health of students at registration and on Form 511E;~~
    - (iii) ~~that parents or students aged 18 or over are advised to purchase private health care insurance if they are not covered by OHIP.~~
  - (e) ~~For out-of-country excursions, all students and supervisors shall have hospital and medical insurance coverage for outside Canada during the excursion.~~
  - (f) ~~Teachers and adult supervisors shall carry the Student Excursion Report (Trillium) on every excursion. This will ascertain that students' medical information is directly accessible to them throughout the excursion.~~

#### Emergency Communications

- (a) ~~In advance of the excursion, the teacher in charge shall leave an itinerary of the excursion in the school office, including contact information, so that the principal or his or her designate may contact the teacher in charge if an emergency arises.~~
- (a) ~~The principal or designate identified to the teachers shall be available by telephone, cellular telephone, or other wireless means of communication to~~

~~teachers in case an emergency arises at any time during the excursion, or if a return is delayed.~~

- ~~(b) The principal shall keep with him or her at all times, as well as posting in the office:
 
  - ~~(i) the phone number or contact information for the principal or designate;~~
  - ~~(ii) the itinerary and phone numbers for the excursion teacher for excursions.~~~~
- ~~(c) Wherever possible, supervisors on an excursion shall carry cellphones and/or two-way radios. Where cellphones and/or two-way radios are the property of the school, the principal shall make such items available to supervisors on an excursion. Supervisors shall ensure that cellphones and/or two-way radios are in good working condition, and any batteries are fully charged prior to the excursion.~~
- ~~(d) Wherever possible, supervisors on an excursion shall carry copies of the emergency procedures checklists for accidents and missing students (see Appendices H1 and H2 respectively).~~

### Early Termination of Excursions

~~In the event that the principal or teacher in charge determines that a student or students should return home prior to the end of the excursion, the principal or teacher in charge shall inform the custodial parents and make suitable and safe arrangements for the return of the students.~~

### Requirements of Program Service Providers

- ~~(a) When utilizing a Program Service Provider for an excursion, the teacher in charge shall determine that the Program Service Provider carries general liability insurance by obtaining a copy of the policy or certificate of insurance.~~
- b) ~~The teacher in charge shall ensure that Program Service Providers have qualified and/or certified instructors, where necessary. Specific qualification and certification requirements, for certain activities are set out in the Physical Education/Outdoor Education Elementary and Secondary Curricular Safety documents, or the Physical Education Elementary and Secondary Interscholastic Athletics Safety documents, or the Physical Education Elementary and Secondary Intramural Safety documents.~~
  - ~~(b) From time to time, organizations may require the participants in an excursion to complete a waiver and/or release forms prior to participating in the excursion activities. Generally speaking, these forms contain legal language releasing the organization and its officers, directors, agents, and employees from any and all liability. Where an organization requests that a waiver and/or release form be signed, the teacher in charge of this excursion shall submit the forms to the superintendent of education, prior to the excursion, for his or her approval. External waivers must be acceptable to the Board's Legal Services Department and approved by the superintendent of education.~~

**Summary of Approval Requirements  
(excluding Physical Education/Athletics)**

Excursion Category	Examples	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
<b>Walking Excursions into the Immediate Community</b>  <del>Physical Education excursion that takes place within walking distance of the school (in the immediate community)</del>	Walk to local library, shopping trips, local environmental study  * Note: For physical education/athletics activities, see Appendix B.	Yes <b>Form 511H</b>	No	Yes <b>Form 511H</b>	<ul style="list-style-type: none"> <li><del>Form 511H: Walking Excursion—Immediate Community is to be signed by parent/guardian at the beginning of the school year. Where possible, parents/guardians will be notified of each event in advance by one or more of the following methods: school newsletter, class newsletter, a note in student planner/agenda.</del></li> </ul>
<b>Day Trip in GTA (not High-Care)</b>  <del>Excursions of one day or less within the Greater Toronto Area (including the city of Toronto and the regional municipalities of Durham, Halton, Peel, and York) and not involving activities of high care (See Appendix C: High-Care Activities.)</del> <i>Note: For a series of excursions, competitions, or repetitive visits, e.g., math teams, debating teams, include a schedule of visits with Forms 511A and 511C.</i>	Toronto Region Conservation areas (TRCA), Metro Toronto Zoo, Ontario Science Centre  * Note: For physical education/athletics activities, see Appendix B.	Yes <b>Form 511A</b>  <b>Form 511F (if volunteer drivers used)</b>	No	Yes <b>Form 511C</b>	<ul style="list-style-type: none"> <li><del>Student Excursion Report</del></li> <li><del>See also the Physical Education Curricular/ Interschool Athletic/ Intramural Safety documents.</del></li> <li><del>See also Safety Guidelines, Science and Co-op.</del></li> </ul>

Excursion Category	Examples	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
<b>Day Trip outside GTA</b> (not High-Care)  Excursions of one day or less outside the Greater Toronto Area (including the City of Toronto and the regional municipalities of Durham, Halton, Peel, and York) and not involving activities of high care (See Appendix C: High-Care Activities.)	Niagara Falls, Barrie, Midland, Wye Marsh	Yes <b>Form 511A</b>  <b>Form 511F (if volunteer drivers used)</b>	Yes <b>Form 511B (1 month in advance)</b>	Yes <b>Form 511C</b>  <b>Form 511F (if volunteer drivers used)</b>	<ul style="list-style-type: none"> <li>• <del>Student Excursion Report</del></li> <li>• <del>Bus Seating Plan</del></li> </ul>
<b>Day Trip in GTA</b> (High-Care)  Excursion involving high-care activities not listed in Physical Education/Outdoor Education Curricular/Interschool Athletic/Intramural Safety documents	Tall ships tour of Toronto Harbour; river ecology study of Don River	Yes <b>Form 511A</b>  <b>Form 511F (if volunteer drivers used)</b>  <b>Form 511G</b>	Yes <b>Form 511B (1 month in advance)</b>	Yes <b>Form 511C</b>  <b>Form 511F (if volunteer drivers used)</b>	<ul style="list-style-type: none"> <li>• <del>Student Excursion Report</del></li> <li>• <del>See also the Physical Education Curricular/Interschool Athletic/Intramural Safety documents.</del></li> </ul>
<b>Day Trip outside GTA</b> (High-Care)  Excursion involving high-care activities not listed in Physical Education/Outdoor Education Curricular/Interschool Athletic/Intramural Safety documents	Alpine skiing, mountain biking	Yes <b>Form 511A</b>  <b>Form 511F (if volunteer drivers used)</b>  <b>Form 511G</b>	Yes <b>Form 511B (1 month in advance)</b>	Yes <b>Form 511C</b>	<ul style="list-style-type: none"> <li>• <del>Student Excursion Report</del></li> <li>• <del>Bus Seating Plan</del></li> <li>• <del>See also the Physical Education Curricular/Interschool Athletic/Intramural Safety documents.</del></li> </ul>

Excursion Category	Examples	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
<b>Overnight Trip in GTA</b> (Not High-Care on school days)	Overnight excursion to TRCA Conservation Field Centre; overnight at Ontario Science Centre	Yes <b>Form 511A</b>  <b>Form 511E</b>  <b>Form 511F (if volunteer drivers used)</b>  <b>Form 511G</b>	Yes <b>Form 511B</b> (1 month in advance)	Yes <b>Form 511C</b>  <b>Form 511E</b>	<ul style="list-style-type: none"> <li>• <del>Student Excursion Report</del></li> <li>• <del>See also the Physical Education Curricular/ Interschool Athletic/ Intramural Safety documents.</del></li> </ul>
<b>Overnight Trip outside GTA</b> (Not High-Care)  Board-initiated activities and excursions organized by centrally assigned Coordinators <b>(excluding excursions to Board Outdoor Education schools scheduled by Coordinator of Outdoor Education)</b>  Excursions on days not identified as instructional days on the approved school year calendar or in the summer	Music and Arts camps, trip to Ottawa  Music Camp, Students Environment Network Retreat, Math Skills Competition  Weekend skills competition, weekend camp, March Break trip within the Province	Yes <b>Form 511A</b>  <b>Form 511E</b>  <b>Form 511F (if volunteer drivers used)</b>  <b>Form 511G</b>	Yes <b>Form 511B</b> (1 month in advance)	Yes <b>Form 511C</b>  <b>Form 511E</b>  <b>Form 511F (if volunteer drivers used)</b>	<ul style="list-style-type: none"> <li>• <del>Student Excursion Report</del></li> <li>• <del>Bus Seating Plan</del></li> <li>• <del>See also the Physical Education Curricular/ Interschool Athletic/ Intramural Safety documents.</del></li> </ul>
<b>Overnight Trip in GTA</b> (High-Care)  Excursion involving high-care activities not listed in Physical Education/Outdoor Education Curricular/Interschool Athletic/ Intramural Safety documents	Lake study at TRCA Conservation Field Centre	Yes <b>Form 511A</b>  <b>Form 511F (if volunteer drivers used)</b>  <b>Form 511G</b>	Yes <b>Form 511B</b> (1 month in advance)	Yes <b>Form 511C</b>  <b>Form 511E</b>  <b>Form 511F (if volunteer drivers used)</b>	<ul style="list-style-type: none"> <li>• <del>Student Excursion Report</del></li> <li>• <del>See also the Physical Education Curricular/ Interschool Athletic/ Intramural Safety documents.</del></li> </ul>

Excursion Category	Examples	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
<b>Overnight Trip outside GTA (High-Care)</b>  Excursion involving high-care activities not listed in Physical Education/Outdoor Education Curricular/Interschool Athletic/Intramural Safety documents	Ski trip, canoe trip; camps with high-care activities, e.g., swimming and canoeing	Yes <b>Form 511A</b>  <b>Form 511F (if volunteer drivers used)</b>  <b>Form 511G (if high-care or overnight)</b>  <b>Form 511E (if overnight—exceptions)</b>	Yes <b>Form 511B (1 month in advance)</b>	Yes <b>Form 511C</b>  <b>Form 511E</b>  <b>Form 511F (if volunteer drivers used)</b>	<ul style="list-style-type: none"> <li>• <del>Student Excursion Report</del></li> <li>• <del>Bus Seating Plan</del></li> <li>• <del>See also the Physical Education Curricular/Interschool Athletic/Intramural Safety documents.</del></li> </ul>
<b>Out-of-Province, Overnight Excursions</b>	Quebec City, Montreal, New York City	Yes <b>Form 511A</b>  <b>Form 511G</b>  <b>Form 511E</b>  <b>Form 511F (if volunteer drivers used)</b>	Yes <b>Form 511B (3 months in advance of excursion)</b>  <b>Note*</b> <b>(6 months in advance for out-of-country)</b>	Yes <b>Form 511C</b>  <b>Form 511E</b>	<ul style="list-style-type: none"> <li>• <del>Specific forms: visa, proof of citizenship, passports, Ontario Health Card #, out-of-country health/accident/travel insurance as required</del></li> <li>• <del>Check the Consular Affairs Web site for specific requirements for the destination if out-of-country (www.voyage.gc.ca).</del></li> <li>• <del>See also the Physical Education Curricular/Interschool Athletic/Intramural Safety documents.</del></li> </ul>

Excursion Category	Examples	Required Level of Approval			Notes
		Principal	Superintendent	Parents	

## Appendix C

Excursion Category: Curricular	Examples	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
<b>Walking Excursions into the Immediate Community</b>  Physical Education excursion that takes place within walking distance of the school (in the immediate community)	Fitness walk or run, tennis courts, baseball diamond, tobogganing, cross country running, cycling, in-line skating	Yes <b>Form 511K</b>	No	Yes <b>Form 511K</b>	<ul style="list-style-type: none"> <li>• Every student taking H&amp;PE must complete Form 511K: Physical Education Information and Intramural Permission. This should be done once at the beginning of the year.</li> <li>• Medical information must be collected from each student in the school at the beginning of the year, using Form 511E: Medical Information for Excursions. This satisfies the medical requirements for physical education classes, intramurals, and school athletic teams.</li> <li>• Medical information for each student taking H&amp;PE must be available.</li> <li>• Teachers can access medical information using Trillium—Student Excursion Form.</li> <li>• Form 511K is not a parental permission form for H&amp;PE classes.</li> </ul>



Excursion Category: Curricular	Examples	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
<b>Day Trip in GTA</b> (not High-Care)  Excursions of one day or less within the Greater Toronto Area (including the city of Toronto and the regional municipalities of Durham, Halton, Peel, and York) and not involving activities of high-care (See Appendix C: High-Care Activities.)  <i>* Note: For a series of excursions, form (511A) may be completed once if all the dates/times/transportation included.</i>	A fitness club, wall climbing, health clinic tour  <b>or</b>  A series of curricular excursions, e.g., curling, bowling, ice skating (transportation required)	Yes <b>Form 511A</b>  <b>Form 511F (if volunteer drivers used)</b>	No	Yes <b>Form 511C</b>  <b>Form 511F (if volunteer drivers used)</b>	<ul style="list-style-type: none"> <li>Every student taking H&amp;PE must complete Form 511K: Physical Education Information and Intramural Permission. This should be done once at the beginning of the year.</li> <li>Medical information must be collected from each student in the school at the beginning of the year, using Form 511E: Medical Information for Excursions. This satisfies the medical requirements for physical education classes, intramurals, and school athletic teams.</li> <li>Medical information for each student taking H&amp;PE must be available.</li> <li>Teachers can access medical information using Trillium—Student Excursion Form.</li> <li>Form 511K is not a parental permission form for H&amp;PE classes.</li> <li>There is no need to collect medical information again if already on file.</li> <li>See also the Physical Education Curricular/Interscholar Athletic/Intramural Safety documents.</li> </ul>

Excursion Category: Curricular	Examples	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
<del>Day Trip outside GTA (not High-Care)</del>	<del>e.g., visit to a university/ college athletic facility; hiking the Bruce Trail</del>	<del>Yes Form 511A</del>	<del>Yes Form 511B (1 month in advance)</del>	<del>Yes Form 511C</del>	<ul style="list-style-type: none"> <li>• Every student taking H&amp;PE must complete Form 511K: Physical Education Information and Intramural Permission.</li> <li>• Medical information must be collected from each student in the school at the beginning of the year, using Form 511E: Medical Information for Excursions. This satisfies the medical requirements for physical education classes, intramurals, and school athletic teams.</li> <li>• Medical information for each student taking H&amp;PE must be available.</li> <li>• Teachers can access medical information using Trillium—Student Excursion Form.</li> <li>• Form 511K is not a parental permission form for H&amp;PE classes.</li> <li>• There is no need to collect medical information again if already on file, except for overnight excursion.</li> <li>• See also the Physical Education Curricular/Interschool Athletic/Intramural Safety documents.</li> </ul>
<del>Day Trip in and outside the GTA (High-Care) (See Appendix C: High-Care Activities.)</del>	<del>e.g., canoeing, sailing, mountain biking, alpine skiing</del>	<del>Form 511F (if volunteer drivers used)</del>		<del>Form 511E (if overnight)</del>	
<del>Overnight Excursions in and outside GTA (High-Care)</del>	<del>e.g., camping trip, ski trip to Blue Mountain</del>	<del>Form 511G (if overnight or high-care)</del>		<del>Form 511F (if volunteer drivers used)</del>	
<del>Excursions within the province</del>		<del>Form 511F (if volunteer drivers used)</del>			
<del>Day Trip/Overnight, In/Outside GTA</del>	<del>e.g., rowing</del>				
<del>Excursions involving high-care activities not listed in Physical Education/Outdoor Education Curricular/Interschool Athletic/ Intramural Safety documents</del>					
<del>Excursions on days not identified as instructional days on the approved school year calendar</del>	<del>e.g., weekend camping trip</del>				

## Appendix C

Excursion Category: Curricular	Examples	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
<del>Out-of-Province, Overnight Excursions</del>	<del>e.g., ski trip to Quebec City</del>	<del>Yes Form 511K  Form 511A  Form 511E  Form 511G  Form 511F (if volunteer drivers used)</del>	<del>Yes Form 511B (3 months in advance)</del>	<del>Yes Form 511K  Form 511C  Form 511E  Form 511F (if volunteer drivers used)</del>	<ul style="list-style-type: none"> <li>• Every student taking H&amp;PE must complete Form 511K: Physical Education Information and Intramural Permission. This should be done once at the beginning of the year.</li> <li>• Medical information must be collected from each student in the school at the beginning of the year, using Form 511E: Medical Information for Excursions. This satisfies the medical requirements for physical education classes, intramurals, and school athletic teams.</li> <li>• Medical information for each student taking H&amp;PE must be available.</li> <li>• Teachers can access medical information using Trillium—Student Excursion Form.</li> <li>• Form 511K is not a parental permission form for H&amp;PE classes.</li> <li>• There is no need to collect medical information again if already on file.</li> <li>• See also the Physical Education Curricular/Interscholar Athletic/Intramural Safety documents.</li> </ul>

## Appendix C

<b>Excursion Category: Curricular</b>	<b>Examples</b>	<b>Required Level of Approval</b>			<b>Notes</b>
		<b>Principal</b>	<b>Superintendent</b>	<b>Parents</b>	
<b>Out-of-Country Excursions</b>	e.g., visit to Olympics in Athens, or a ski trip to Switzerland	<b>Yes</b> <del>Form 511K</del> <del>Form 511A</del> <del>Form 511E</del> <del>Form 511G</del> <del>Form 511F (if volunteer drivers used)</del> <del>Form 511G</del>	<b>Yes</b> <del>Form 511B</del> <del>(6 months in advance)</del>	<b>Yes</b> <del>Form 511K</del> <del>Form 511C</del> <del>Form 511E</del> <del>Form 511F (if volunteer drivers used)</del>	<ul style="list-style-type: none"> <li>• <del>Every student taking H&amp;PE must complete Form 511K: Physical Education Information and Intramural Permission. Specific forms: visa, proof of citizenship, passports, Ontario Health Card #, out-of-country health/accident/travel insurance as required</del></li> <li>• <del>Check the Consular Affairs Web site for specific requirements for the destination (www.voyage.gc.ca).</del></li> <li>• <del>Medical information must be collected for all overnight excursions, using Form 511E: Medical Information for Excursions.</del></li> <li>• <del>See also the Physical Education Curricular/Interscholar Athletic/Intramural Safety documents.</del></li> </ul>

## Appendix C

Excursion Category: Intramural	Examples	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
<del>Series or Single Intramural Activity Excursion into Immediate Community</del>	<del>Kilometer club, Terry Fox Run.</del>	<del>Yes Form 511K</del>	<del>No</del>	<del>Yes Form 511K</del>	<ul style="list-style-type: none"> <li>• The school should list the intramural activities on the first page of Form 511K: Physical Education Information and Intramural Permission.</li> <li>• Parental permission is required for every student involved in intramural activities. See Intramural Activities Permission on page 2 of Form 511K: Physical Education Information and Intramural Permission.</li> <li>• Medical information must be collected from each student in the school at the beginning of the year, using Form 511E: Medical Information for Excursions. This satisfies the medical requirements for physical education classes, intramurals, and school athletic teams.</li> <li>• Medical information for each student taking H&amp;PE must be available.</li> <li>• Teachers can access medical information using Trillium – Student Excursion Form.</li> <li>• There is no need to collect medical information again if already on file.</li> <li>• See also the Physical Education Curricular/Interscholastic/Athletic/Intramural Safety documents.</li> </ul>

Excursion Category: Intramural	Examples	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
<del>Day Trip in and outside GTA (not High-Care)</del>	<del>Hiking club</del>				<ul style="list-style-type: none"> <li>• <del>See corresponding type of excursion in the preceding Curricular chart to obtain the information.</del></li> </ul>
<del>Day Trip in and outside GTA (High-Care) (See Appendix C: High-Care Activities.)</del>	<del>e.g., alpine skiing club</del>				<ul style="list-style-type: none"> <li>• <del>See corresponding type of excursion in the preceding Curricular chart to obtain the information.</del></li> </ul>
<del>Overnight Excursion in and outside GTA (not High-Care)</del>	<del>Hiking club</del>				<ul style="list-style-type: none"> <li>• <del>See corresponding type of excursion in the preceding Curricular chart to obtain the information.</del></li> </ul>
<del>Overnight Excursion in and outside GTA (High-Care)</del>	<del>Outers club, canoe trip</del>				<ul style="list-style-type: none"> <li>• <del>See corresponding type of excursion in the preceding Curricular chart to obtain the information.</del></li> </ul>

Appendix C

Excursion Category: Interschool	Forms	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
<b>Day Trip in GTA</b>  Interscholar Athletic Team practice/game/competition within the Greater Toronto Area (including the city of Toronto and the regional municipalities of Durham, Halton, Peel, and York) and not involving activities of high care (See Appendix C: High Care Activities.)	<ul style="list-style-type: none"> <li>Team Eligibility List</li> <li>Form 511I: Elementary Interscholar Athletics Tryout and Participation</li> </ul> <b>or</b> <ul style="list-style-type: none"> <li>Form 511J: Secondary Interscholar Athletics Tryout and Participation</li> <li>* Note: One sample Form 511I/511J, completed with appropriate details, is submitted to principal in order to approve the team details.</li> </ul>	Yes  <b>Team Eligibility List</b>  <b>Form 511I or Form 511J</b>  <b>Form 511F (if volunteer drivers used)</b>	No	Yes <b>Form 511I or Form 511J</b>  <b>Form 511F (if volunteer drivers used)</b>	<ul style="list-style-type: none"> <li>Medical information must be collected from each student in the school at the beginning of the year, using Form 511E: Medical Information for Excursions. This satisfies the medical requirements for physical education classes, intramurals, and school athletic teams.</li> <li>Medical information for each team member must be available.</li> <li>Coaches can access medical information using Trillium – Student Excursion Form.</li> <li>See also the Physical Education Curricular/ Interscholar Athletic/ Intramural Safety documents.</li> </ul>
<b>Day Trip in GTA</b> (Invisational tournament)	<ul style="list-style-type: none"> <li>Team Eligibility List</li> <li>Form 511I: Elementary Interscholar Athletics Tryout and Participation</li> </ul> <b>or</b> <ul style="list-style-type: none"> <li>Form 511J: Secondary Interscholar Athletics Tryout and Participation</li> </ul>	<b>Team Eligibility List</b>  <b>Form 511I or Form 511J</b>  <b>Form 511F (if volunteer drivers used)</b>	No	Yes <b>Form 511I or Form 511J</b>  <b>Form 511F (if volunteer drivers used)</b>	<ul style="list-style-type: none"> <li>Medical information must be collected from each student in the school at the beginning of the year, using Form 511E: Medical Information for Excursions. This satisfies the medical requirements for physical education classes, intramurals, and school athletic teams.</li> </ul>



## Appendix C

Excursion Category: Interschool	Forms	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
	<ul style="list-style-type: none"> <li>* <del>Note: One sample Form 511I/511J, completed with appropriate details, is submitted to principal in order to approve the team details.</del></li> <li><del>If the invitational tournament was included in the original team schedule listed on Form 511I/511J: Interschool Athletics Tryout and Participation, or an addendum to the schedule was made for both the principal and the parents, then a second eligibility list and Form 511I/511J are not necessary.</del></li> </ul>				<ul style="list-style-type: none"> <li><del>Medical information for each team member must be available.</del></li> <li><del>Coaches can access medical information using Trillium – Student Excursion Form.</del></li> <li><del>Reminder: If medical information has been collected for team members, it is not necessary to collect it for each tournament.</del></li> <li><del>For a stand-alone invitational tournament, Form 511E: Medical Information for Excursions, Form 511I/511J: Interschool Athletics Tryout and Participation, and Team Eligibility List must be completed as indicated.</del></li> <li><del>If the invitational tournament was included with the original team schedule on Form 511I/511J: Interschool Athletics Tryout and Participation, then the forms indicated on the left are not necessary.</del></li> <li><del>See also the Physical Education Curricular/ Interschool Athletic/ Intramural Safety documents.</del></li> </ul>

## Appendix C

Excursion Category: Interschool	Forms	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
<p><del>Day Trip outside GTA</del> (Invitational tournament)</p> <p><del>Overnight Excursion in and outside GTA</del> (Invitational tournament)</p> <p><del>Invitational Tournament</del></p> <p>On days not identified as instructional days on the approved school year calendar.</p>	<ul style="list-style-type: none"> <li><del>Team Eligibility List</del></li> <li><del>Form 511I: Elementary Interschool Athletics Tryout and Participation</del></li> <li><del>or</del></li> <li><del>Form 511J: Secondary Interschool Athletics Tryout and Participation</del></li> <li><del>* Note: One sample Form 511I/511J, completed with appropriate details, is submitted to principal in order to approve the team details.</del></li> <li><del>Form 511A: Request for Excursion Approval by Principal</del></li> <li><del>Form 511B: Request for Excursion Approval by Superintendent of Education</del></li> <li><del>Form 511C: Parent/Guardian Permission for Excursion</del></li> <li><del>If the invitational tournament was included in the original team schedule listed on Form 511I/511J: Interschool Athletics Tryout and Participation, or an addendum to the schedule was made for</del></li> </ul>	<p><del>Yes</del></p> <p><del>Team Eligibility List</del></p> <p><del>Form 511A</del></p> <p><del>Form 511I or Form 511J</del></p> <p><del>Form 511F (if volunteer drivers used)</del></p> <p><del>Form 511G</del></p>	<p><del>Yes</del></p> <p><del>Form 511B (1 month in advance) (exception: OFSAA)</del></p>	<p><del>Yes</del></p> <p><del>Form 511C</del></p> <p><del>Form 511I or Form 511J</del></p> <p><del>Form 511F (if volunteer drivers used)</del></p>	<ul style="list-style-type: none"> <li><del>Medical information must be collected from each student in the school at the beginning of the year, using Form 511E: Medical Information for Excursions. This satisfies the medical requirements for physical education classes, intramurals, and school athletic teams.</del></li> <li><del>Medical information for each team member must be available.</del></li> <li><del>Coaches can access medical information using Trillium – Student Excursion Form.</del></li> <li><del>For a stand-alone invitational tournament, the medical information must be available (Form 511E must be completed again for overnight), Form 511I/511J: Interschool Athletics Tryout and Participation, and Team Eligibility List must be completed as indicated.</del></li> <li><del>See also the Physical Education Curricular/ Interschool Athletic/ Intramural Safety documents.</del></li> </ul>

Excursion Category: Interschool	Forms	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
	both the principal and the parents, then a second eligibility list and Form 511I/511J are not necessary.				
<b>Invitational Tournament Out-of-Province</b>	Same as Day Trip outside GTA, Overnight Excursion in and outside GTA, and Invitational Tournament	Yes Same as Day Trip outside GTA, Overnight Excursion in and outside GTA, and Invitational Tournament	Yes <b>Form 511B (3 months in advance)</b>	Yes Same as Day Trip outside GTA, Overnight Excursion in and outside GTA, and Invitational Tournament	<ul style="list-style-type: none"> <li>Same as Day Trip outside GTA, Overnight Excursion in and outside GTA, and Invitational Tournament</li> <li>Exception to timelines will be considered on an individual basis at superintendent's discretion (see F. (f) in operational procedures).</li> <li>See also the Physical Education Curricular/ Interschool Athletic/ Intramural Safety documents.</li> </ul>
<b>Invitational Tournament Out-of-Country</b>	Same as Day Trip outside GTA, Overnight Excursion in and outside GTA, and Invitational Tournament	Yes Same as Day Trip outside GTA, Overnight Excursion in and outside GTA, and Invitational Tournament	Yes <b>Form 511B (6 months in advance)</b>	Yes Same as Day Trip outside GTA, Overnight Excursion in and outside GTA, and Invitational Tournament	<ul style="list-style-type: none"> <li>Same as Day Trip outside GTA, Overnight Excursion in and outside GTA, and Invitational Tournament</li> <li>Exception to timelines will be considered on an individual basis at superintendent's discretion (see F. (f) in operational procedures).</li> </ul>

**Appendix C**

<b>Excursion Category:</b> <b>Interschool</b>	<b>Forms</b>	<b>Required Level of Approval</b>			<b>Notes</b>
		<b>Principal</b>	<b>Superintendent</b>	<b>Parents</b>	
					<ul style="list-style-type: none"> <li>• <del>Specific forms: visa, proof of citizenship, passports, Ontario Health Card #, out-of-country health/accident/travel insurance as required.</del></li> <li>• <del>Check the Consular Affairs Web site for specific requirements for the destination (www.voyage.gc.ca).</del></li> <li>• <del>See also the Physical Education Curricular/ Interschool Athletic/ Intramural Safety documents.</del></li> </ul>
<b>OFSAA Tournaments</b>	<ul style="list-style-type: none"> <li>• <del>Coach carries Form 511I/511J: Interschool Athletics Tryout and Participation and Team Eligibility List.</del></li> <li>• <del>Form 511A: Request for Excursion Approval by Principal</del></li> <li>• <del>Form 511C: Parent/Guardian Permission for Excursion</del></li> </ul>	<p>Yes</p> <p><b>Form 511A</b></p> <p><b>Form 511F (if volunteer drivers used)</b></p>	<b>Blanket approval for OFSAA</b>	<p>Yes</p> <p><b>Form 511C</b></p> <p><b>Form 511F (if volunteer drivers used)</b></p>	<ul style="list-style-type: none"> <li>• <del>Medical information for each team members must be available.</del></li> <li>• <del>Coaches can access medical information using Trillium – Student Excursion Form.</del></li> <li>• <del>Where possible, Form 511E: Medical Information for Excursions will be issued again for overnight OFSAA tournaments.</del></li> <li>• <del>Form 511B: Request for Excursion Approval by Superintendent of Education is not necessary because</del></li> </ul>

Exeursion Category: Interschool	Forms	Required Level of Approval			Notes
		Principal	Superintendent	Parents	
					<div>blanket approval for all OFSAA competition will be obtained by the central Health and Physical Education Department.</div> <div>• See also the Physical Education Curricular/ Interschool Athletic/ Intramural Safety documents.</div>

**High-Care Activities**

~~See Appendix A: Summary of Approval Requirements (excluding Physical Education/ Athletics), Appendix B1: Summary of Approval Requirements for Physical Education Curricular Activities, Appendix B2: Summary of Approval Requirements for Intramural Activities, and Appendix B3: Summary of Approval Requirements for Interschool Athletics which summarizes the approval requirements for all excursions.~~

~~Excursions that occur outside the GTA and/or are overnight require superintendent approval (Form 511B: Request for Excursion Approval by Superintendent of Education).~~

~~High-Care Activities~~ “High-care activities,” as used in this document, refer to those types of activities that involve increased risk and/or special safety considerations along with one or more of the following:

- ~~▪—multiple risks, e.g., weather,~~
- ~~▪—occur in or on the water (with the exception of timetabled physical education water activities, or outdoor education water activities scheduled by the Coordinator of Outdoor Education, or travel on large water vehicles used for public transportation), or~~
- ~~▪—require special qualifications or certification for supervision, or~~
- ~~▪—take place away from easy access to first aid.~~

~~\*Note: Higher Risk Sports as listed in the Physical Education Interschool Athletics Safety documents are not considered to be high-care activities/excursions. Students involved on the Higher Risk Interschool Athletics teams are more highly skilled and have had training in preparation for games/tournaments.~~

~~High-care activities require superintendent approval (Form 511B: Request for Excursion Approval by Superintendent of Education), as well as principal approval.~~

~~More information about supervision and certification requirements for Physical Education Outdoor Education activities can be found in the Physical Education/Outdoor Education Elementary/Secondary Curricular Safety documents (see section C of the Outdoor Education General Procedures), and the Physical Education Elementary/Secondary Interschool Athletics Safety documents and the Physical Education Elementary/Secondary Intramural Safety documents.~~

~~High-care activities include but are not limited to:~~

<del>alpine skiing</del>	<del>in-line skating to in-line skating parks</del>
<del>cross-country skiing</del>	<del>mountain biking</del>
<del>Snowtubing</del>	<del>lake swimming</del>
<del>snowboarding</del>	<del>swimming in non-TDSB/non-City of Toronto pools, e.g., hotel pools, wave pools</del>
<del>snow-blading</del>	<del>rock climbing (secondary only))</del>

<del>Excursions to non-Board approved sites for wall climbing, bouldering, ascending lines, ropes/challenge courses, zipline, tyrolean traverse and equivalent</del>
----------------------------------------------------------------------------------------------------------------------------------------------------------------------

<del>Any other activity not listed in the TDSB Physical Education/Outdoor Education Elementary and Secondary Safety documents (Curricular, Interschool Athletics, Intramural)</del>
-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

~~Certain excursion activities will not be approved, as they are deemed to be unsafe because of high and/or multiple risk factors. Examples of such activities include, but are not limited to: whitewater canoeing; whitewater rafting; parasailing; parachuting; gliding; hang gliding; bungee jumping; swimming parties at private or non-regulated pools, rivers, or lakes; hot air balloon rides; snorkeling; and scuba diving. \*Note: Scuba diving and snorkelling can occur in a curricular class setting with proper supervision ratios under the direction of staff with appropriate qualifications/certifications.~~

## Supervision

[Excerpted from the Physical Education/Outdoor Education Elementary/Secondary Curricular Safety documents]

### Elementary

Supervision is the overseeing of an activity for regulation or direction. All facilities, equipment, and activities have inherent risks, but the more effectively they are supervised, the safer they become.

Students must be aware that the use of equipment and the gymnasium are prohibited without the appropriate type of supervision. Deterrents must be in place, for example:

- locked doors;
- signs on doors indicating that students are not to use the gym unless supervised;
- staff scheduled and present in an adjoining Physical Education office, in order to observe students entering the gym without authorization.

Any use of a facility must be supervised. This guideline has designated three categories of supervision: Constant visual, On-site/In-sight, and In-the-area. The categories are based on the principles of general and specific supervision, which take into consideration the risk level of the activity, the participants' skill level and the participants' maturity.

The three categories of supervision can be illustrated as follows: *Constant visual* supervision means that the teacher is physically present, watching the specific activity in question. Only one activity requiring constant visual supervision may take place while other activities are going on. *On-site/In-sight* supervision entails teacher presence, but not necessarily constant viewing of one specific activity. *In-the-area* supervision means that the teacher could be in the gymnasium while another activity is taking place in an area near the gymnasium.

Example: During a track and field session, some students are involved in high jump and some are practising relay passing on the track, while a third group is distance running around the school.

*Constant visual supervision*—High Jump: Teacher is **at** the high jump area and is **observing** the activity.

*On-site/In-sight supervision*—Relay Passing: Students are practising on the track and **can be seen** by the teacher who is with the high jumpers.

*In-the-area supervision*—Distance Running: Students are running around the school grounds and **at times may be out of sight**.



### Points to Consider

(a) — Establish routines, rules of acceptable behaviour, and appropriate duties of students at the beginning of the year and reinforce them throughout the year. Teachers must sanction students for unsafe play or unacceptable behaviour, and must exercise that responsibility at all times. Refer to Appendix D: Supervision for more information on student behaviour.

Students must be made aware of the rules of activities or games. Rules may be modified to suit the age and physical ability of the participants, but once made, they must be strictly enforced.

The teacher must be vigilant to prevent one student from pressuring another into trying skills or activities for which he or she is not ready.

When a student displays verbal or non-verbal hesitation, the teacher should discuss the reason(s) for doubt. If the teacher believes that a potential hesitancy during the skill could put the student at risk, the student must be directed toward a more basic skill.

A co-op student or secondary student must not be the sole supervisor of any activity.

### Supply Teacher Coverage

- The supply teacher must have students participate in activities that are commensurate with his or her experience or qualifications.
- The Safety Document sheet(s) for the activity must be included with the lesson plan.
- The supply teacher must be informed of the whereabouts of a contact teacher or administrator in case of an emergency.
- Restrictions/modifications for students with health or behavioural problems must be specified.

### Secondary

(a) — Supervision is the overseeing of an activity for regulation or direction. All facilities, equipment, and activities have inherent risks, but the more effectively they are supervised, the safer they become.

Students must be aware that the use of equipment and the gymnasium are prohibited without the appropriate type of supervision. Deterrents must be in place, for example:

- locked doors;
- signs on doors indicating that students are not to use the gym unless supervised;
- staff scheduled and present in an adjoining Physical Education office, in order to observe students entering the gym without authorization.

Any use of a facility must be supervised. This guideline has designated three categories of supervision: Constant visual, On-site/In-sight, and In-the-area. The categories are based on the principles of general and specific supervision, which take into consideration the risk level of the activity, the participants' skill level and the participants' maturity.

The three categories of supervision can be illustrated as follows: *Constant visual* supervision means that the teacher is physically present, watching the specific activity in question. Only one activity requiring constant visual supervision may take place while other activities are going on. *On-site/In-sight* supervision entails teacher presence, but not necessarily constant viewing of one specific activity. *In-the-area* supervision means that the teacher could be in the gymnasium while another activity is taking place in an area near the gymnasium.

Example: During a track and field session, some students are involved in high jump and some are practising relay passing on the track, while a third group is distance running around the school.

*Constant visual supervision*—High Jump: Teacher is **at** the high jump area and is **observing** the activity.

*On-site/In-sight supervision*—Relay Passing: Students are practising on the track and **can be seen** by the teacher who is with the high jumpers.

*In-the-area supervision*—Distance Running: Students are running around the school grounds and **at times may be out of sight**.

#### Points to Consider

(a) Establish routines, rules of acceptable behaviour, and appropriate duties of students at the beginning of the year and reinforce them throughout the year. Teachers must sanction students for unsafe play or unacceptable behaviour, and must exercise that responsibility at all times. Refer to Appendix D: Supervision for more information on student behaviour.

Students must be made aware of the rules of activities or games. Rules may be modified to suit the age and physical ability of the participants, but once made, they must be strictly enforced.

The teacher must be vigilant to prevent one student from pressuring another into trying skills or activities for which he or she is not ready.

When a student displays verbal or non-verbal hesitation, the teacher should discuss the reason(s) for doubt. If the teacher believes that a potential hesitancy during the skill could put the student at risk, the student must be directed toward a more basic skill.

A co-op student or secondary student must not be the sole supervisor of any activity.

#### On-Call and Supply Teacher Coverage

- The supply or on-call teacher must have students participate in activities that are commensurate with his/her experience or qualifications.
- The Safety Document sheet(s) for the activity must be included with the lesson plan.
- The supply or on-call teacher must be informed of the whereabouts of a contact teacher or administrator in case of an emergency.
- ☐ Restrictions/modifications for students with health or behavioural problems must be specified.



## **~~Excursion Procedures Questions and Answers~~**

*~~This document will answer common questions about the new excursion Policy and Procedures. For further information, forms, and more details, please read the Policy and Procedures.~~*

*~~A companion handbook will be developed and distributed during the 2004–2005 school year.~~*

---

### **~~What is an excursion?~~**

~~Any approved, school-organized educational activity involving students that takes place off school property.~~

~~Each excursion should have an educational purpose and clearly identified curriculum expectations, and should receive the same degree of preparation and follow-up as other classroom activities.~~

### **~~What is the TDSB's commitment to excursions? (see Board Policy P.033 SCH: Excursions)~~**

~~The Board recognizes and encourages the educational value of learning experiences in the world beyond the classroom, and acknowledges that excursions should be an integral part of every student's program of studies.~~

~~The Board is committed to the full and equitable inclusion of all students in safe, curriculum-based excursions.~~

~~Student safety shall be the priority in the planning and implementation of all excursions.~~

### **~~What about students with special needs?~~**

~~The TDSB's policy states that every effort shall be made to ensure that all excursions are available and accessible to students with special needs.~~

### **~~When do I need parental consent?~~**

~~The TDSB's policy states that the written informed consent of custodial parent(s) or guardian(s) shall be obtained for all excursions. This means that any time a teacher is taking students off school property, written informed consent is required.~~

~~Students aged 18 and over may consent on their own behalf.~~

**How do I obtain parental consent?**

Use Form 511C: Parent/Guardian Permission for Excursion, or the appropriate athletics form.

For overnight excursions, it is suggested that parent information sessions be held to outline the educational purpose, explain risks, and answer any questions.

**What if a student does not return the consent form?**

Where the written informed consent of custodial parents cannot be obtained, the student shall be excluded from the excursion unless the principal decides that it is appropriate to allow the student to participate. The principal must have verbal permission from the custodial parents, and the activity cannot be high-care, overnight, or outside the Greater Toronto Area (GTA).

**What about teams or athletics events?**

Follow the information contained in the Physical Education/Outdoor Education Elementary and Secondary Curricular Safety documents, and/or the Physical Education Elementary and Secondary Interscholastic Athletics Safety documents that can be found in your school.

**What if I am going to occasionally walk my class to the library? Do I need to have the parents sign a form?**

Yes. Use Form 511H: Walking Excursion—Immediate Community. This form can be distributed at the beginning of the year. You will notify parents/guardians of the particular activity, location, date, and time through newsletters, Web sites, or notes in school planners/agendas.

**What if I am going to take my gym classes to the neighbourhood tennis courts every other week? Do I need to have the parents sign a form?**

Yes. Where the excursion involves a series of related or repeated events or activities to the same destination or for the same purpose, prepare a schedule of activities and a list of dates on a single Form 511C: Parent/Guardian Permission for Excursion (or appropriate athletics form). You only need to do the form once if the excursion involves a series of related or repeated events or activities to the same destination or for the same purpose.

**What supervision is required?**

The following chart shows the minimum supervision ratios for a group of 30 students. You can increase the number of supervisors.

Minimum Supervision Ratios (for a maximum group size of 30 students)		
Grade Levels	Day Excursions	Overnight Excursions
JK–K	Three adult supervisors per group	Not recommended
1–3	Two adult supervisors per group	Not recommended for Grade 1. (Special permission of superintendent of education required for Grades 2 or 3; four adult supervisors per group)
4–8	Two adult supervisors per group	Two adult supervisors per group
9–12	One adult supervisors per group	Two adult supervisors per group

~~Where the excursion involves Physical Education or Interscholastic Athletics, the minimum supervision ratios for the specific activity must be obtained from the Physical Education/ Outdoor Education Elementary and Secondary Curricular Safety documents, or the Physical Education Elementary and Secondary Interscholastic Athletics Safety documents, or the Physical Education Elementary and Secondary Intramural Safety documents.~~

### **~~Who can help with supervision?~~**

~~You can ask principals, vice principals, teachers, education staff, or parent or community volunteers. All supervisors must be over 18 years of age.~~

~~Elementary and middle schools may use senior high school students as assistants on excursions at the discretion of the principal, but these students must be used as assistants only, and not as excursion supervisors.~~

~~It is a good idea to include adults or older students who speak the languages of some of the students, especially when recent arrivals are among the group.~~

### **~~What approvals do I need?~~**

~~Follow the Appendices A, B1, and B2 chart in the **Procedures** for complete details.~~

~~Your principal can approve excursions that are not high care and are one day or less within the GTA. Use Form 511A.~~

~~For excursions that are high care or beyond the GTA, you need both your principal and superintendent's approval. Use Forms 511A and 511B. Refer to the **Procedures** for specific requirements and timelines.~~

~~High-care, out-of-province, and international excursions have specific timelines, requirements, and forms, including contingency planning, student waivers, and student medical information forms. Follow the requirements in the **Procedures**.~~

### **~~What about trips to amusement parks such as Canada's Wonderland or Ontario Place?~~**

~~Trips that do not reflect the curriculum or do not have a clear educational purpose or cannot be adequately supervised will not be considered or approved. Examples of such activities include but are not limited to trips to amusement parks such as Canada's Wonderland and Ontario Place, which involve large groups of students on their own for the day to enjoy rides.~~

### **~~What are some of the things I have to do when transporting students?~~**

~~If you are using a bus or vehicle owned or rented by the TDSB, you will need to make a seating plan if you are going beyond the GTA. Carry a copy with you and leave a copy in the school.~~

~~You should also carry the Trillium Student Excursion Report, which is list of the students' home numbers, parents' work numbers and /or emergency telephone numbers. As well, you should carry copies the of emergency procedures checklists for accidents and missing students (see Appendices H1 and H2 respectively).~~

~~If students are going in separate vehicles, keep a list of which students are in each vehicle, along with the licence plate number of each vehicle.~~

~~Students are expected to carry identification with them, including home, emergency, and school telephone numbers.~~

~~When TTC services are used, an adult supervisor shall travel with all students, K-8 inclusive, to the excursion location and return to the school. Students in Grades 7 and 8 may be dismissed from the venue, or the appropriate transit stop, provided prior written informed consent from custodial parents has been obtained.~~

~~When TTC services are used, students in Grades 9-12 may travel to and from the excursion venue without adult supervision, provided prior written informed consent from custodial parents has been obtained. When travelling without adult supervision, students should be encouraged to travel with a “buddy.” When students are travelling together in a group of eight or more, they should be accompanied by an adult supervisor where possible.~~



### **Parents'/Guardians' Responsibilities for Excursions**

- ~~Each September, all custodial parents shall be provided with a copy of Parents'/Guardians' Responsibility for Excursions.~~
- ~~Each September, Parents will receive a Form 511E: Medical Information for Excursions. This must be signed and returned to the school within the first two weeks of classes. If your child/ward has or has had any health problems that might affect his/her participation or safety, or requires special attention for him/her during the excursion, please note the details on the form. More complete information may be provided in writing or via telephone to the teacher involved.~~
- ~~Form 511E authorizes the teacher in charge of the excursion to seek and obtain medical care, if necessary, for the student.~~
- ~~Please inform the school of any changes to the medical and emergency information for your child/ward. If your child/ward has, or has had, any health problems that might affect his/her participation or safety or require special attention for him/her during the excursion, please give full details in writing, and telephone the teacher to discuss any concerns.~~
- ~~Custodial parent(s) or guardian(s) of students under the age of 18 who wish their child to participate in an excursion are required to provide consent for each excursion by completing and returning to the teacher a Form 511C: Parent/Guardian Permission for Excursion (or the appropriate athletics form). Students aged 18 and over may sign Form 511C: Parent/Guardian Permission for Excursion (or the appropriate athletics form) on their own behalf; however, it is strongly recommended that the custodial parent(s) or guardian(s) of such students also sign the form.~~
- ~~Form 511C: Parent/Guardian Permission for Excursion (or the appropriate athletics form) will contain information about the nature and purpose of the excursion, any special risks or unusual activities, locations, date(s) and/or times, supervision, transportation arrangements, including mode of transport, use of volunteer drivers, costs, special clothing or equipment required, lunch or other food requirements, any other information that could have some bearing on whether the parent/guardian would give or withhold consent, a request to update relevant medical or emergency information, and a reminder that student accident insurance may be purchased.~~

- ~~Every effort shall be made to advise custodial parent(s) or guardian(s) of any volunteer drivers participating in the excursion, and to provide them with specific information about the volunteer drivers' vehicles. Every effort shall be made to obtain written informed consent from the custodial parent(s) or guardian(s) in order for the student to ride with a volunteer driver.~~
- ~~Student accident insurance is available to provide coverage beyond that allowed by the Ontario Health Plan. Contact the school for specific information and application forms.~~
- ~~Custodial parent(s) or guardian(s) are expected to ensure that their child is prepared appropriately for the excursion.~~
- ~~The Board's Safe Schools Policy and this school's Code of Behaviour and the Board's Human Rights Policy apply throughout the trip. Copies are available from the school office.~~
- ~~The Board has complete authority and discretion to exclude a child/ward from participation in this activity or to send a child/ward home from the activity early for breach of the Board's Safe Schools Policy or the school's Code of Behaviour or the Board's Human Rights Policy, and in such event, the parent/guardian will be responsible for any related expenses, including lost deposit and additional travel costs.~~
- ~~The Toronto District School Board will have complete discretion to cancel this excursion in the interest of student safety or for any other emergency, and that in such event, the parent/guardian will be liable for any non-refundable deposit associated with this activity.~~





## ~~Students' Responsibilities on Excursions~~

### **For Students**

- ~~(a) Students shall follow the Board's Safe Schools Policy and the school's Code of Behaviour while on excursions. Students involved in interschool athletics shall also follow the Code of Behaviour for Athletes while on excursions. Students on excursions who fail to follow the Safe Schools Policy, the school's Code of Behaviour, or the Code of Behaviour for Athletes (if applicable), will be subject to the same consequences as if the students were in attendance at school during regular school hours.~~
- ~~(b) While on excursions, and while travelling to and from excursions, students will continue to be responsible for their conduct to the principal. Students shall comply with their obligations under section 23 of Regulation 298 of the *Education Act*, including the following:
 
  - ~~\* exercising self discipline;~~
  - ~~\* accepting such discipline as would be exercised by a kind, firm, and judicious parent;~~
  - ~~\* being courteous to fellow pupils and obedient and courteous to teachers;~~
  - ~~\* being clean in person and in habits; and~~
  - ~~\* showing respect for school property.~~~~
- ~~(c) Students shall adhere to Board policy that prohibits tobacco, the use of alcohol, and the non-medical use of drugs at all school activities, whether they take place inside school or off school property on excursions.~~
- ~~(d) Students are expected to be prepared for the excursion and adhere to excursion expectations.~~
- ~~(e) Students shall follow the directions of teachers and other supervisors during the excursion.~~
- ~~(f) Students who participate in an excursion are expected to complete, without penalty, any assignments and assessments missed in other subjects due to the excursion, within a reasonable time after the excursion, as determined by the student's teachers.~~

**~~EMERGENCY PROCEDURES CHECKLIST~~****~~ACCIDENT~~**

<b><del>SEQUENCE</del></b>	<b><del>ACTION PLAN</del></b>	<b><del>RESPONSIBILITY</del></b>	<b><del>PLANNING NOTES</del></b>
<del>1</del>	<del>Account for all participants. Remove participants from further danger. Provide comfort and maintain supervision.</del>	<del>Teacher in charge</del>	
<del>2</del>	<del>Assess the situation. Determine if immediate medical care or assistance is required.</del>	<del>Teacher in charge</del>	
<del>3</del>	<del>Call 911. Administer first aid or CPR as required.  Do not move victim if: • <del>unconscious</del> • <del>neck or back injury</del> • <del>significant loss of blood</del></del>	<del>Teacher in charge</del>	
<del>4</del>	<del>Call school emergency contact. Review plan.</del>	<del>Teacher in charge</del>	
<del>5</del>	<del>Inform parent/guardian.</del>	<del>Principal</del>	
<del>6</del>	<del>Transport injured participant(s) to medical care as quickly as possible.</del>	<del>Teacher in charge</del>	
<del>7</del>	<del>Send staff member or adult supervisor to hospital with injured participant(s). Contact principal from hospital with an update.</del>	<del>Teacher in charge</del>	
<del>8</del>	<del>Update principal.</del>	<del>Teacher in charge</del>	
<del>9</del>	<del>Keep ongoing written log of events and times when possible.</del>	<del>Teacher in charge</del>	

\*Teacher in charge can delegate tasks 2, 6, 7, and 9 to supervisors

**~~Considerations in reporting an emergency:~~**

- ~~State name of school/site.~~
- ~~State name of caller.~~
- ~~Describe the nature of the problem.~~

**~~Give telephone number where emergency is:~~**

- ~~Describe type and extent of injury.~~
- ~~How many participants are injured.~~
- ~~Describe the action taken.~~
- ~~Specify needs (i.e., medical, transportation, supervision).~~

**EMERGENCY PROCEDURES CHECKLIST****MISSING STUDENT**

SEQUENCE	ACTION PLAN	RESPONSIBILITY	PLANNING NOTES
1	Inform teacher in charge immediately	Other supervisors	
2	Initiate search using only <u>known</u> adults. Do not leave other students unsupervised.	Teacher in charge	
3	Inform Principal (or designate) if student not found within 30 minutes of reported missing. Keep principal informed of any new developments.	Teacher in charge	
4	Inform local police.	Teacher in charge	
5	Await arrival of police before arranging the return of other students to school (or residence/dormitory).	Teacher in charge	
6	Inform parent/guardian.	Principal	
7	Inform supervisory officer.	Principal	
8	<del>Deal with media.</del>	<del>Principal</del>	
9	<del>Other students must be returned to pre-arranged location within one hour of designated return time.</del>	<del>Principal</del>	
10	Teacher must remain to provide information when police arrive.	Teacher in charge	

### Health Coverage

- i. Individuals who were born in Canada and reside in Ontario have universal access to the Ontario Health Insurance Plan (OHIP).
  - ii. Permanent residents (formerly referred to as landed immigrants) obtain OHIP coverage beginning 90 days after entry to Canada.
  - iii. Refugee claimants who are in possession of the Immigration, Refugees and Citizenship Canada under Form IMM1442 (Determination of Eligibility for refugee status or Refugee Protection Claimant Document), are provided with the Federal Health Insurance Plan.
  - iv. Temporary ~~residents~~ Residents such as diplomats or guest workers do not have access to health coverage. Private health insurance must be purchased in order to have medical coverage.
  - v. Where students do not have health coverage and an incident happens at school, Ontario School Boards' Insurance Exchange (OSBIE) will reimburse Parents/Guardians ~~parents~~ for ambulance costs and the first day of emergency care at a hospital. Parents/Guardians must present a paid invoice for these services to the ~~school~~ principal. The invoice and copy of the incident report are forwarded to OSBIE.
  - vi. Visa students have private health coverage as part of their tuition fee to the TDSB.
  - vii. For families who remain in Canada after their refugee claim is rejected, or families who have been in the country without status, do not have health insurance. Private health insurance would be the only form of coverage that they can access.
- c) All ~~parents or~~ students may purchase student accident insurance, provided they are covered under OHIP. Principals are advised to ensure that: from Reliable Life starting at approximately \$2. This is distributed in September of each year for purchase
- i. a Plan of Care has been developed and shared and reviewed with staff and supervisors of the Excursion when required.
- Parents/Guardians or students aged 18 or over are advised to purchase private health care
- ii. For students without insurance if they, there are not covered by OHIP.
- d) For Out-of-Country Excursions, all students must purchase travel insurance, including cancellation and medical coverage. All Supervisors , except if working for the Board, must purchase travel insurance, including cancellation and medical coverage. Board staff should purchase cancellation coverage at the time of booking. will have hospital and medical insurance coverage for outside Canada during the Excursion.
- e) Teacher(s) in charge of the Excursion and adult supervisors will carry the Student Excursion Report on every Excursion.

### **K.3 Emergency Communications**

- a) In advance of the Excursion, the teacher in charge of the Excursion will leave an itinerary of the Excursion in the school office, including contact information so that the Principal or designate may contact the teacher in charge of the Excursion if an emergency arises.
- b) The principal or his/her designate identified to the teacher(s) in charge of the Excursion will be available by telephone, cellular telephone, or other wireless means of communication to teacher(s) in charge of the Excursion in case an emergency arises at any time during the Excursion, or if a return is delayed, or any other matters that require the principal's assistance.
- c) Wherever possible, Supervisors will carry cellphones and/or two-way radios. Where cellphones and/or two-way radios are the property of the school, the principal will make such items available to Supervisors. Supervisors must ensure that cellphones and/or two-way radios are in good working condition, and any batteries are fully charged prior to the Excursion.

### **K.4 Early Termination of Excursions**

- a) In the event that the principal or teacher in charge of the Excursion determines that a student or students should return home prior to the end of the Excursion, the principal or teacher in charge of the Excursion will inform the Parents/Guardians and make suitable and safe arrangements for the return of the student(s).

### **K.5 Requirements of Program Service Providers**

- a) When utilizing a Program Service Provider, the teacher in charge of the Excursion will determine that the Program Service Provider carries general liability insurance by obtaining a copy of the policy or certificate of insurance.
- b) The teacher in charge will ensure that Program Service Providers have qualified and/or certified instructors, where necessary. Specific qualification and certification requirements for certain activities are set out the OPHEA in the OPASSE.

## **7. EVALUATION**

This procedure will be reviewed as required, but at a minimum every four (4) years after the effective date.

## **8. APPENDICES**

Appendix A: EMA Workflow Summary

Appendix B: Emergency Procedures Checklist: Accident

Appendix C: Emergency Procedures Checklist: Missing Student  
Appendix D: 511F: Volunteer Driver Form  
Appendix E: 511H: Walking Excursion – Immediate Community

## **9. REFERENCE DOCUMENTS**

### **TDSB Policies:**

- Equity Policy (P037) Excursions Policy (P033)
- Restrictions on Alcohol, Drug and Tobacco Use Policy (P095)
- Student Health Support Policy (P092)
- Transportation of Students Policy (P020)
- Caring and Safe Schools Policy (P051)

### **TDSB Operational Procedures:**

- Anaphylaxis in Schools Procedure (PR563)
- Asthma Management Procedure (PR714)
- Board Code of Conduct (PR585)
- Concussions Management Procedure (PR712)
- Diabetes Management Procedure (PR607)
- Medication Procedure (PR536)
- Transportation of Students Procedure (PR504)

### **Legislative Acts, Regulations and Government Policies:**

- Education Act, R.S.O. 1990, c. E.2
- Regulation 298: Operation of Schools under Education Act, R.S.O. 1990, c. E.2
- Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, Chapter M.56.
- Personal Health Information Protection Act, Clinics in Toronto that will provide service. The following list, dated 2004, S.O. 2004, Chapter 3, Schedule A June 10, is provided for the assistance of school staff.
- Child, Youth and Family Services Act, S.O. 2017, Chapter 14, Sched.1.
- Policy/Program Memorandum No. 161: Supporting Children and Students with Prevalent Medical Conditions (Anaphylaxis, Diabetes, and/or Epilepsy) in Schools (Ontario Ministry of Education).

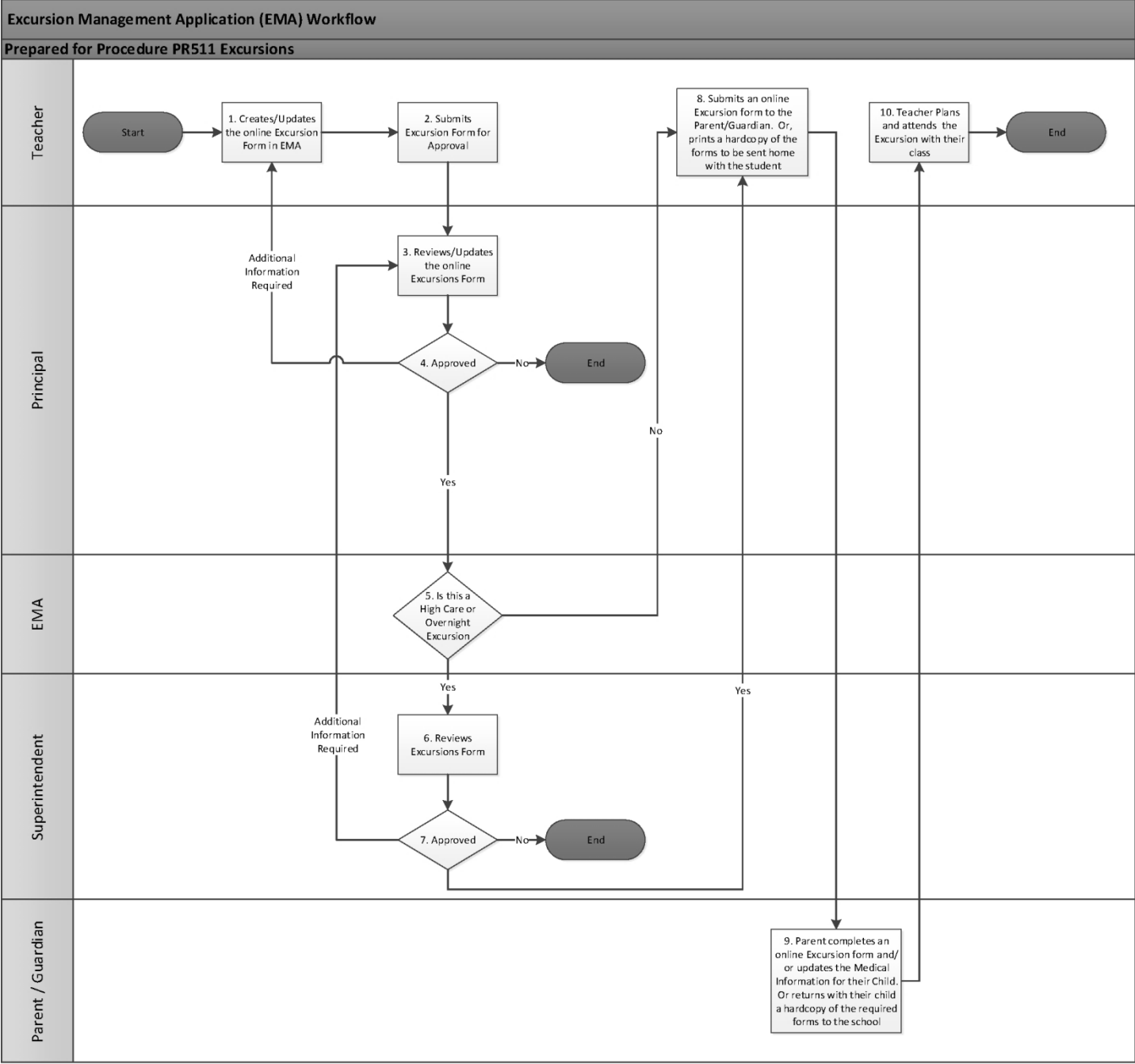
### **Other Related Documents:**

- Ontario Health and Physical Education Association: Ontario Physical Activity Safety Standards in Education
- Growing Success: Assessment, Evaluation, and Reporting in Ontario Schools – First Edition (Covering Grades 1 to 12), 2010 (Ontario Ministry of Education)
- Growing Success – The Kindergarten Addendum: Assessment, Evaluation, and Reporting in Ontario Schools, 2016 (Ontario Ministry of Education)
- TDSB Excursion and Event Facility Directory

- TDSB Guidelines and Procedures for the Accommodation of Religious Requirements, Practices, and Observances, 2010.
- TDSB Employee Services Protocol: Police Reference Checks (SR23).

Appendix A

Excursion Management Application (EMA) Workflow





**EMERGENCY PROCEDURES CHECKLIST**  
**ACCIDENT**

<b><u>SEQUENCE</u></b>	<b><u>ACTION PLAN</u></b>	<b><u>RESPONSIBILITY</u></b>	<b><u>PLANNING NOTES</u></b>
<b><u>1</u></b>	<u>Account for all participants.</u> <u>Remove participants from further danger.</u> <u>Provide comfort and maintain Supervision</u>	<u>Teacher in charge of the Excursion</u>	
<b><u>2</u></b>	<u>Assess the situation.</u> <u>Determine if immediate medical care or assistance is required.</u>	<u>Teacher in charge of the Excursion</u>	
<b><u>3</u></b>	<u>Call 911.</u> <u>Administer first aid or CPR as required.</u>  <u>Do not move victim if:</u> <ul style="list-style-type: none"> <li>• <u>unconscious</u></li> <li>• <u>neck or back injury</u></li> <li>• <u>significant loss of blood</u></li> </ul>	<u>Teacher in charge of the Excursion</u>	
<b><u>4</u></b>	<u>Call school emergency contact.</u> <u>Review contingency plan.</u>	<u>Teacher in charge of the Excursion</u>	
<b><u>5</u></b>	<u>Inform Parent(s)/Guardian(s).</u>	<u>Principal</u>	
<b><u>6</u></b>	<u>Transport injured participant(s) to medical care as quickly as possible</u>	<u>Teacher in charge of the Excursion</u>	
<b><u>7</u></b>	<u>Send staff member or adult supervisor to hospital with injured participant(s).</u> <u>Contact principal from hospital with an update.</u>	<u>Teacher in charge of the Excursion</u>	
<b><u>8</u></b>	<u>Update principal.</u>	<u>Teacher in charge of the Excursion</u>	
<b><u>9</u></b>	<u>Keep ongoing written log of events and times when possible.</u>	<u>Teacher in charge of the Excursion</u>	

\*Teacher in charge of the Excursion can delegate tasks 2, 6, 7, and 9 to the supervisor(s)

**Considerations in reporting an emergency:**

- State name of school/site.

- State name of caller.
- Describe the nature of the problem.
- Give telephone number where emergency is.
- Describe type and extent of injury(ies).
- How many participants are injured.
- Describe the action(s) and steps taken.
- Specify needs (i.e., medical, transportation, supervision).

Appendix C

**EMERGENCY PROCEDURES CHECKLIST**  
**MISSING STUDENT**

<b><u>SEQUENCE</u></b>	<b><u>ACTION PLAN</u></b>	<b><u>RESPONSIBILITY</u></b>	<b><u>PLANNING NOTES</u></b>
<u>1</u>	<u>Inform the teacher in charge of the Excursion immediately.</u>	<u>Other supervisor</u>	
<u>2</u>	<u>Initiate search using only known adults. Do not leave other students unsupervised.</u>	<u>Teacher in charge of the Excursion</u>	
<u>3</u>	<u>Inform the principal (or his/her designate) if student not found within 30 minutes of reported missing. Keep the principal informed of any new developments.</u>	<u>Teacher in charge of the Excursion</u>	
<u>4</u>	<u>Inform local police.</u>	<u>Teacher in charge of the Excursion</u>	
<u>5</u>	<u>Await arrival of police before arranging the return of other students to school (or residence/dormitory).</u>	<u>Teacher in charge of the Excursion</u>	
<u>6</u>	<u>Inform Parent/Guardian.</u>	<u>Principal</u>	
<u>7</u>	<u>Inform supervisory officer (e.g. Superintendent of Education).</u>	<u>Principal</u>	

**Toronto Public Health Centres** *(as of 2004 June 10)*

**Access Alliance Multicultural Community Health Centre**

340 College Street, Suite 500

Toronto, Ontario

M5T 3A9

Canada

Tel: 416-324-8677

Fax: 416-324-9074

**Anishnawbe Health Toronto**

225 Queen Street East

Toronto, Ontario

M5A 1S4

Canada

Tel: 416-360-0486

Fax: 416-365-1083

**Anne Johnston Health Station**

2398 Yonge Street  
Toronto, Ontario  
M4P 2H4  
Canada  
Tel: 416-486-8666  
TTY: 416-486-6759  
Fax: 416-486-8660

**Bernard Betel Centre for Creative Living**

1003 Steeles Avenue West  
Toronto (North York), Ontario  
M2R 3T6  
Canada  
Tel: 416-225-2112  
Fax: 416-225-2097  
Web site: <[www.betelcentre.org/](http://www.betelcentre.org/)>

**Black Creek Community Health Centre**

2202 Jane Street, Unit 5  
Toronto, Ontario  
M3M 1A4  
Canada  
Tel: 416-249-8000  
Fax: 416-249-4594

**Centre médico-social communautaire**

22 College Street, Main Floor  
Toronto, Ontario  
M5G 1K3  
Canada  
Tel: 416-922-2672  
Fax: 416-922-6624

**Davenport Perth Neighbourhood Centre**

1900 Davenport Road  
Toronto, Ontario  
M6N 1B7  
Canada  
Tel: 416-656-6812  
Fax: 416-656-1264

**East End Community Health Centre**

343 Coxwell Avenue  
Toronto, Ontario  
M4L 3B5  
Canada  
Tel: 416-778-5858  
Fax: 416-778-5855

**Flemingdon Health Centre**

10 Gateway Boulevard

Toronto (Don Mills), Ontario  
M3C 3A1  
Canada  
Tel: 416 429 4991  
Fax: 416 422 3573

**Four Villages Community Health Centre**  
1700 Bloor Street West  
Toronto, Ontario  
M6P 4C3  
Canada  
Tel: 416 604 3361  
Fax: 416 604 3367

**Lakeshore Area Multi-Service Project Inc. (LAMP)**  
185—5th Street  
Toronto (Etobicoke), Ontario  
M8V 2Z5  
Canada  
Tel: 416 252 6471  
Fax: 416 252 4474  
Web site: <[www.lampehc.org/](http://www.lampehc.org/)>

**Lawrence Heights Community Health Centre**  
12 Flemington Road  
Toronto, Ontario  
M6A 2N4  
Canada  
Tel: 416 787 1661  
Fax: 416 787 3761  
Web site: <[www.lawrenceheightsche.on.ca](http://www.lawrenceheightsche.on.ca)>

**Parkdale Community Health Centre**  
1229 Queen Street West  
Toronto, Ontario  
M6K 1L2  
Canada  
Tel: 416 537 2455  
Fax: 416 537 5133

**Planned Parenthood of Toronto**

36B Prince Arthur Avenue  
Toronto, Ontario  
M5R 1A9  
Canada  
Tel: 416-961-0113  
Fax: 416-961-2512  
Web site: <[www.ppt.on.ca](http://www.ppt.on.ca)>

**Regent Park Community Health Centre**

465 Dundas Street East  
Toronto, Ontario  
M5A 2B2  
Canada  
Tel: 416-364-2261  
Fax: 416-364-0822  
Web site: <[www.regentparkche.org](http://www.regentparkche.org)>

**Rexdale Community Health Centre**

8 Taber Road  
Toronto (Etobicoke), Ontario  
M9W 3A4  
Canada  
Tel: 416-744-0066  
Fax: 416-744-1881  
Web site: <[www.rexdale.on.ca/rchc/](http://www.rexdale.on.ca/rchc/)>

**South Riverdale Community Health Centre**

955 Queen Street East  
Toronto, Ontario  
M4M 3P3  
Canada  
Tel: 416-461-1925  
Fax: 416-461-3578

**Stonegate Community Health Centre**

150 Berry Road  
Toronto (Etobicoke), Ontario  
M8Y 1W3  
Canada  
Tel: 416-231-7070  
Fax: 416-231-2663  
Web site: <[www.stonegateche.org/](http://www.stonegateche.org/)>

**Central Toronto Community Health Centres**

Queen West CHC  
168 Bathurst Street  
Toronto, Ontario  
M5V 2R4  
Canada  
Tel: 416-703-8482  
Fax: 416-703-7832

**Shout Clinic**

467 Jarvis Street  
Toronto, Ontario  
M4Y 2G8  
Canada  
Tel: 416-927-8553  
Fax: 416-927-9365

**West Hill Community Services**

3545 Kingston Road  
Toronto (Scarborough), Ontario  
M1M 1R6  
Canada  
Tel: 416-284-5931  
Fax: 416-724-5205  
Web site: <www.westhill-es.on.ca>

**Women's Health in Women's Hands**

2 Carlton Street, Suite 500  
Toronto, Ontario  
M5B 1J3  
Canada  
Tel: 416-593-7655  
TTY: 416-593-5835  
Fax: 416-593-5867  
Web site: <www.whiwh.com>

**York Community Services**

1651 Keele Street  
Toronto, Ontario  
M6M 3W2  
Canada  
Tel: 416-653-5400  
Fax: 416-653-1696

<u>8</u>	<u>Deal with media.</u>	<u>Principal</u>	
<u>9</u>	<u>Other students must be returned to pre-arranged location within one hour of designated return time.</u>	<u>Principal</u>	
<u>10</u>	<u>Teacher in charge of the Excursion must remain to provide information when</u>	<u>Teacher in charge of the Excursion</u>	

	<u>police arrive.</u>		
--	-----------------------	--	--



**511F: VOLUNTEER DRIVER FORM**

Form 511F  
May 9, 2005  
Page 1 of 2

**Principal Authorization for Volunteer Drivers**

The collection and retention of the information requested on this form is authorized and governed by the Ontario Education Act and the Municipal Freedom of Information and Protection of Privacy Act.

This will authorize \_\_\_\_\_  
(Name of teacher or other volunteer driver)

to transport students participating in the following school excursion: \_\_\_\_\_

**Driver Authorization**

*This form must be signed both by the owner of the vehicle and by the driver.*

**1. Declaration to be signed by the owner of the vehicle**

Vehicle Information: Make/Model \_\_\_\_\_ Year \_\_\_\_\_ Licence \_\_\_\_\_

I declare that I have authorized \_\_\_\_\_ to drive my vehicle to transport students participating in the school event(s) listed on this form. She/he holds an unrestricted Class G2 or better driver's licence and is licensed to drive in Ontario, and is insured as an operator under a valid automobile liability insurance policy as required by Ontario law.

I declare that the vehicle described above is mechanically fit, there are seat belts in working condition for all passengers, and that the appropriate car/booster seats are used.

I agree to inform the school of any changes in the vehicle or driver information.

Name of owner \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_  
(Please print)

**2. Declaration to be signed by driver**

I declare that I hold an unrestricted driver's Class G2 or better licence and am licensed to drive in Ontario, and that my vehicle is insured by a valid automobile liability insurance policy as required by Ontario law.

I agree to inform the school of any changes in the vehicle or driver information.

Name of driver \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

**3. Declaration to be signed by parent(s)/guardian(s), if driver is a student**

I declare that my daughter/son has my permission to be a volunteer driver for students participating in the school excursion(s) listed on this form. I further declare that my daughter/son holds an unrestricted Class G2 or better driver's licence and is licensed to drive in Ontario, and is insured as an operator under a valid automobile liability insurance policy as required by Ontario law.

Name of parent/guardian \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_



Form 511F  
May 9, 2005  
Page 2 of 2

### Principal Authorization

*The Principal shall request to see original documents where possession of such documents is to be shown.*

All "Trip Drivers," including volunteer drivers, are advised that, in order to bring into effect the Toronto District School Board's (TDSB) Excess Liability Insurance, they must:

- ☐ have a booster seat for each child under the age of 8 or between 18-36 Kg and a standing height less than 145 cm;
- ☐ use a licensed automobile that carries valid automobile third-party liability insurance as required under Ontario legislation;
- ☐ provide the TDSB with prompt written notice, with particulars, of any accident arising out of the use of a licensed automobile during an excursion on TDSB-related business;
- ☐ be aware that the TDSB's Excess Automobile Liability insurance comes into effect only after the vehicle owner's insurance has been exhausted;
- ☐ be aware that any damage to the volunteer's vehicle, the cost of any insurance deductible, or premium adjustment as the result of an accident while the vehicle is being used on Board-related business, is NOT covered by the TDSB's Excess Automobile Liability insurance;
- ☐ carry a minimum of \$1 million of third-party automobile liability insurance (as recommended by the Board).

**Note:** A "Trip Driver" is defined as any person authorized by the TDSB who has agreed to be a driver for a certain excursion while he/she is driving their own or another licensed automobile, to include trustees, employees, teachers, students, parents, volunteers and officials of the TDSB.

School Name \_\_\_\_\_ Date \_\_\_\_\_

Principal's Name \_\_\_\_\_

Signature \_\_\_\_\_

\*For office use only

Distribution (after final approval):

Driver \_\_\_\_\_

Principal \_\_\_\_\_

**511H: WALKING EXCURSION – IMMEDIATE COMMUNITY**



Form 511H  
Aug. 30, 2004  
Page 1 of 1

**Walking Excursion Form – Immediate Community**

School: \_\_\_\_\_ Teacher: \_\_\_\_\_

Principal: \_\_\_\_\_ Principal Signature: \_\_\_\_\_

**Dear Parent/Guardian:**

From time to time, students are engaged in non-high-care curricular activities that occur off school property in the immediate community, but within walking distance of the school. Some examples of these activities are walking to the library, the local park, and the local store.

**School-Specific Activities:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The principal will approve these excursions, and teacher supervision will be provided at all times.

Whenever possible, parents/guardians will be notified in advance by one or more of the following methods:

- school newsletter,
- class newsletter,
- a note in the student planner/agenda,
- the school Web site.

Please sign and return the bottom section of the page.

**PERMISSION FOR WALKING EXCURSION – IMMEDIATE COMMUNITY**

Student Name: \_\_\_\_\_

Teacher: \_\_\_\_\_

In signing this form, I give permission for my child, \_\_\_\_\_, to participate in those school-specific curricular activities that occur off school property in the immediate community and within walking distance of the school.

Name of Parent/Guardian: \_\_\_\_\_ (*print*)

Signature of Parent/Guardian: \_\_\_\_\_ Date: \_\_\_\_\_

Appendix BMinistry of Education Final Report Review and Assessment of Ontario School Board Policies and Procedures on Outdoor Ed/Excursions involving Water-Related Activities**Ministry of Education**

Deputy Minister

Mowat Block  
Queen's Park  
Toronto ON M7A 1L2**Ministère de l'Éducation**

Sous-ministre

Édifice Mowat  
Queen's Park  
Toronto ON M7A 1L2

**Memorandum To:** Directors of Education  
Supervisory Officers of School Authorities  
Executive Director, Provincial and Demonstration Schools Branch

**From:** Bruce Rodrigues  
Deputy Minister

**Date:** May 1, 2018

**Subject:** Final Report – Review and assessment of Ontario school board policies and procedures on outdoor education/excursions involving water-related activities

---

I am writing to update you on the third party review of school board policies and procedures for safety during outdoor education excursions involving water-related activities. Thank you for your participation in the review. Deloitte Inc. (Deloitte) relayed that they encountered overwhelming support from you and your staff during their data collection, and that the passion and dedication of school board staff for delivering safe outdoor education opportunities to students was evident throughout the review process.

Deloitte has completed its work for the ministry and has submitted a final report. The Executive Summary of this report and a presentation on the findings and recommendations are attached. The full report will be sent to you once it has been translated by the end of May.

As you know, this review was initiated in response to the tragic death of a student during an excursion in Algonquin Park in July 2017. The purpose of the review was to determine:

- whether school boards have policies and procedures in place that meet the minimum standards for risk management during outdoor education/excursions with water-related activities; and
- how school boards monitor implementation and ensure compliance with existing policies and procedures.

.../2

-2-

The report outlines that the majority of school boards that responded to Deloitte's online survey have policies and/or procedures in place. I would like to emphasize that the ministry's expectation is for all school boards to ensure that they have outdoor education/excursion policies and/or procedures in place that meet or exceed the minimum standards laid out in the Ontario Physical Education Safety Guidelines managed by Ophea.

We also expect that boards are reviewing and updating these policies and/or procedures regularly. I urge you to review your existing policies and procedures in light of this report and consider whether any enhancements are needed, for example to include considerations related to the diversity of your board's student population.

As a critical part of this review, please consider opportunities to further support board and school staff with the implementation of policies and/or procedures, including the need to strengthen monitoring and compliance activities.

### **Next Steps**

The Ministry of Education accepts the recommendations in the Deloitte report and is committed to addressing them collaboratively with our school boards and other partners. For instance, the report's findings indicate there is a desire for greater training, guidance, and resources for school boards and schools. In response, the ministry will develop or enhance training modules related to safety during outdoor education/excursions, explore opportunities for more centralized online hosting of resources related to outdoor education/excursions, and facilitate a community of practice to support ongoing information sharing between school boards. We will engage with school boards in the coming months to further discuss a detailed plan to respond to the recommendations.

We recognize the need for cooperation across the sector as we work to address these recommendations and prioritize student safety during all curriculum-linked learning experiences, including outdoor excursions. Where possible, we will leverage existing opportunities and align efforts related to student injury prevention to enhance a culture of safety-mindedness for everyone in the school environment. Further actions may be identified when the Ontario Provincial Police and Coroner investigations into the incident last summer are complete.

### **Webinar**

As an immediate step, the Safe and Healthy Schools, Program Implementation, and French-Language Teaching and Learning branches are offering a series of webinars to discuss the funding model and reporting tool for outdoor education. We will also solicit initial feedback to help us prioritize the types of resources and/or training modules related to safety during outdoor education/excursions that would be most useful for boards.

.../3

-3-

Outdoor education leads in English-language boards can join one of the following two webinars:

- May 7<sup>th</sup> from 1:00pm – 3:00pm.
- May 8<sup>th</sup> from 10:00am – 12:00pm.

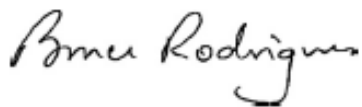
Outdoor education leads in French-language boards can join the following webinar:

- May 8<sup>th</sup> from 1:00pm – 3:00pm.

Details on the webinars and registration will be sent to your board's outdoor education lead in the coming days.

We look forward to working together as we address the recommendations to support the delivery of safe outdoor education opportunities for all students.

If you have any questions about the report or next steps, please contact Debbie Thompson, Director of the Safe and Healthy Schools Branch, at [debbie.thompson@ontario.ca](mailto:debbie.thompson@ontario.ca) or (416) 325-7645.



Bruce Rodrigues  
Deputy Minister

Attachments:

- Executive Summary of Deloitte Report
- PowerPoint Slide Presentation prepared by Deloitte

c: Denise Dwyer, Assistant Deputy Minister, Indigenous Education and Well-Being Division  
Denys Giguère, Assistant Deputy Minister, French-Language Teaching, Learning and Achievement Division  
Martyn Beckett, Assistant Deputy Minister, Student Achievement Division  
Debra Cormier, Director, Field Services Branch  
Council of Ontario Directors of Education

---

**Blank Page**

**Written Notice of Motion for Consideration (Trustee Rajakulasingam, on behalf of Trustee Smith and Trustee Mammoliti)**

From: Denise Joseph-Dowers, Manager, Board Services, Governance and Board Services

In accordance with Board Bylaw 5.15.2, the following motion is submitted as notice at this time and for consideration at the next scheduled meeting of the Committee.

5.15.2 A notice of motion will be introduced by a member who is present as an advance notification of a matter at Board or Committee, and will be considered at a subsequent Committee meeting. A notice of motion will not be debated at the meeting at which it is introduced...

5.15.2 (c) A notice of motion submitted prior to, or at a committee meeting, will be considered at a subsequent committee meeting...

**Renaming Schools Celebrating the Diversity of Toronto**

Whereas, the Toronto District School Board has 583 schools, located in every community across Toronto; and

Whereas, school names are an opportunity to teach students about their community's history and place and their community's leaders and heroes; and

Whereas, there are few new school naming opportunities due to the small number of schools being opened each year; and

Whereas, few schools are named after celebrated Indigenous or Black Leaders or Leaders of colour; and

Whereas, some school names do not reflect the values of contemporary Toronto; and

Whereas, some schools are named after people with a racist legacy; and

Whereas, policy P047, Naming of Schools and Special Purpose Areas and procedure PR592, Naming of Schools and Special Purpose Areas create impediments to review or change school names and themselves might be characterized as systemically racist policies;

Whereas, based on the Board's policy review schedule, review of policy P047 is currently under Phase 3 of the policy review process;

Therefore, be it resolved:

- (a) That a special purpose reference group comprised of students, parents, TDSB educators, community members, academics and individuals involved in anti-racism work, be established:



- (i) to inform the consultation process;
  - (ii) to propose amendments to policy P047 and procedure PR592, Naming of Schools and Special Purpose Areas, so that school naming or renaming can be made from time-to-time to reflect the diversity of the City;
  - (iii) to provide a proposal for a city-wide review of all school names so that TDSB schools reflect the diversity of Toronto's success.
- (b) That the reference group present a report to the Planning and Priorities Committee no later than June 30, 2021.

### **Acknowledgement of Traditional Lands**

We acknowledge we are hosted on the lands of the Mississaugas of the Anishinaabe (A NISH NA BEE), the Haudenosaunee (HOE DENA SHOW NEE) Confederacy and the Wendat. We also recognize the enduring presence of all First Nations, Métis and Inuit peoples.

### **Reconnaissance des terres traditionnelles**

Nous reconnaissons que nous sommes accueillis sur les terres des Mississaugas des Anichinabés (A NISH NA BAY), de la Confédération Haudenosaunee (HOE DENA SHOW NEE) et du Wendat. Nous voulons également reconnaître la pérennité de la présence des Premières Nations, des Métis et des Inuit."

### **Committee Mandate**

The Governance and Policy Committee's mandate will be to consider and make recommendations to the Board on governance and policy matters referred to it for consideration, including review of Board governance practices and the ongoing development and review of the Board's policies.



# Our Mission

To enable all students to reach high levels of achievement and well-being and to acquire the knowledge, skills and values they need to become responsible, contributing members of a democratic and sustainable society.

## We Value

- Each and every student's interests, strengths, passions, identities and needs
- A strong public education system
- A partnership of students, staff, family and community
- Shared leadership that builds trust, supports effective practices and enhances high expectations
- The diversity of our students, staff and our community
- The commitment and skills of our staff
- Equity, innovation, accountability and accessibility
- Learning and working spaces that are inclusive, caring, safe, respectful and environmentally sustainable

## Our Goals

### **Transform Student Learning**

We will have high expectations for all students and provide positive, supportive learning environments. On a foundation of literacy and math, students will deal with issues such as environmental sustainability, poverty and social justice to develop compassion, empathy and problem solving skills. Students will develop an understanding of technology and the ability to build healthy relationships.

### **Create a Culture for Student and Staff Well-Being**

We will build positive school cultures and workplaces where mental health and well-being is a priority for all staff and students. Teachers will be provided with professional learning opportunities and the tools necessary to effectively support students, schools and communities.

### **Provide Equity of Access to Learning Opportunities for All Students**

We will ensure that all schools offer a wide range of programming that reflects the voices, choices, abilities, identities and experiences of students. We will continually review policies, procedures and practices to ensure that they promote equity, inclusion and human rights practices and enhance learning opportunities for all students.

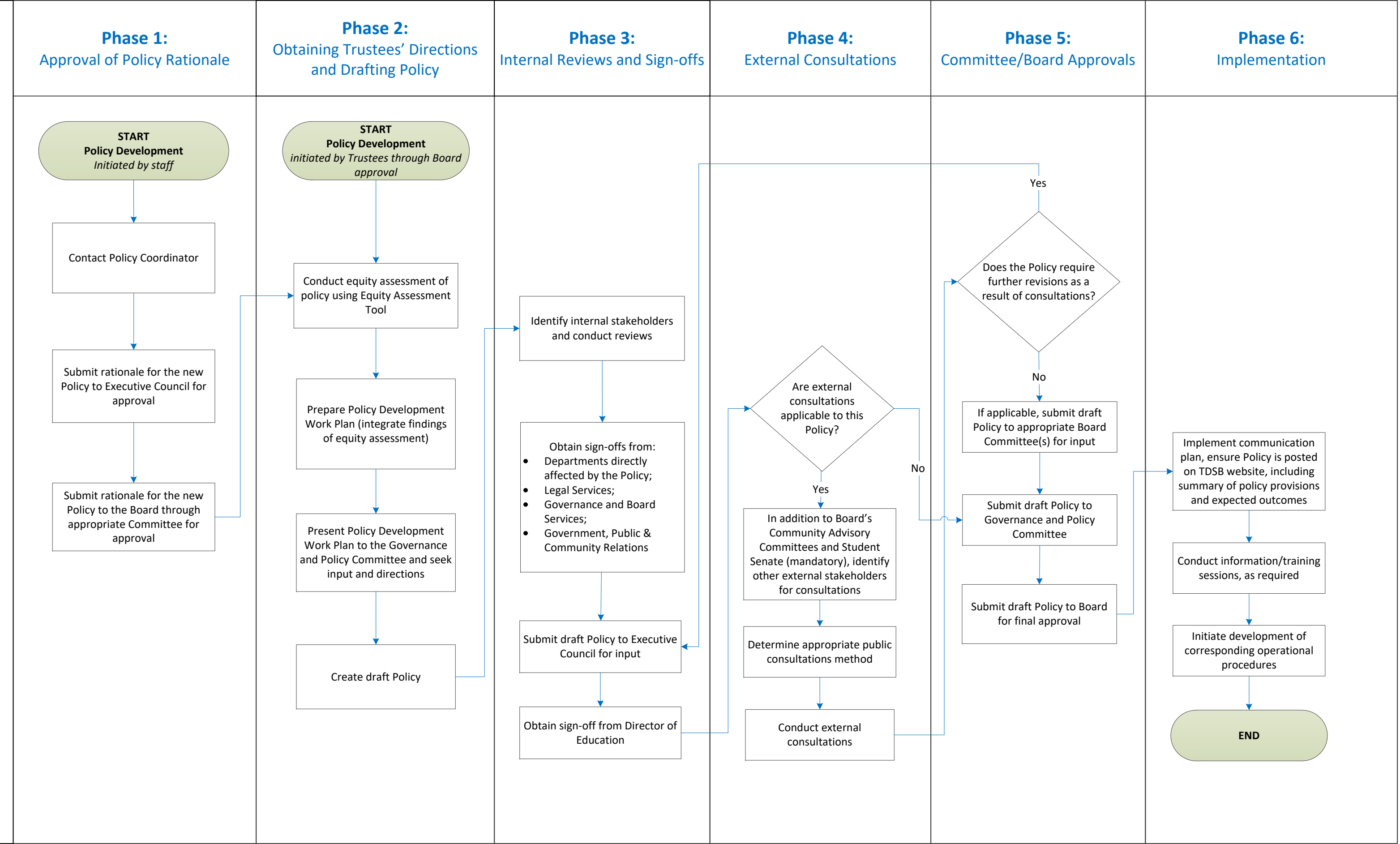
### **Allocate Human and Financial Resources Strategically to Support Student Needs**

We will allocate resources, renew schools, improve services and remove barriers and biases to support student achievement and accommodate the different needs of students, staff and the community.

### **Build Strong Relationships and Partnerships Within School Communities to Support Student Learning and Well-Being**

We will strengthen relationships and continue to build partnerships among students, staff, families and communities that support student needs and improve learning and well-being. We will continue to create an environment where every voice is welcomed and has influence.

POLICY DEVELOPMENT PROCESS



POLICY REVIEW PROCESS

