

**CODE:** CH.AR

**EFFECTIVE DATE:** (29-01-2020)

**TOPIC:** Policy Development and Review

**ISSUE DATE:** (29-01-2020)

**REVIEW YEAR:** (2017)

## OBJECTIVE

To provide a consistent process for reviewing and developing draft policy that will be presented to the Board for consideration to ensure all statements of policy are in accordance with Board Policy CH.BP - Framework for Policy Development and Review.

## DEFINITIONS

**Policy Sponsor** is the District Support Team member assigned by the Superintendent of Schools with the overall responsibility for development, review or revision of a policy. The District Support Team is comprised of the Superintendent of Schools, Assistant Superintendents, and Executive Directors.

**Manager** Policy Development is an individual designated to oversee the implementation of Board Policy CH.BP - Framework for Policy Development and Review. The Manager also provides oversight for the development of administrative regulations on behalf of the Superintendent of Schools.

**Policy Development Lead** is an individual assigned by the Sponsor to lead the development, review or revision of a specific policy.

**Policy Development**, in the context of this regulation, refers to both new policy development and the review and revision of an existing policy.

## RESPONSIBILITY

1. The Superintendent of Schools is responsible for assisting the Board and the Policy Review Committee in their policy roles by assigning resources for drafting new and reviewing and revising existing board policy in accordance with Board Policy CH.BP - Framework for Policy Development and Review.
2. The Manager is responsible for overseeing, coordinating, and providing technical advice and assistance in support of the policy development and review process on behalf of the Superintendent of Schools. The Manager shall:
  - a. identify, develop and maintain format conventions, guidelines and templates to support the policy development process;
  - b. review all draft policy for consistency of style and tone and for compliance with the expectations laid out in Board Policy CH.BP - Framework for Policy Development and Review;
  - c. ensure that all previously approved policies are updated to reflect housekeeping changes that may be made from time to time to organizational titles, responsibilities, legislative references and format conventions;
  - d. track the progress of policy development and reviews for the Policy Review Committee;

- e. provide assistance to the Chair of the Policy Review Committee in preparing the annual policy review plan and making recommendations to the Board as necessary; and
  - f. maintain a record of current and former board policies on behalf of the Division.
3. The Sponsor shall assign each policy to a direct-report administrator for the department/unit whose work most closely aligns with the policy topic.
  4. The Department/Unit Administrator shall:
    - a. work with the Manager to co-ordinate the development and review of policies pertaining to their departments;
    - b. ensure consistency between board policy and administrative regulations, and documents issued by the department (guidelines, bulletins, pamphlets, and operational procedures); and
    - c. assign an appropriate staff member to act as Development Lead for the development and writing of each assigned policy and supporting documentation in accordance with the Board's criteria, format and expectations laid out in Board Policy CH.BP - Framework for Policy Development and Review.

## REGULATION

### A. INITIATION OF THE POLICY PROCESS

1. Development of new policy and review and revision of existing policy is initiated by a Board approved motion and the Board has the opportunity to provide initial guidance as to the scope, purpose and intent of the policy.
  - a. A proposal for a new policy or a review of an existing policy may be brought to the Board by a Trustee, delegation through the Board Community Relations Committee, or the Superintendent of Schools in the form of a recommendation report which if approved is referred to the Policy Review Committee for a policy development plan.
  - b. The Policy Review Committee, in consultation with the Administration, recommends an annual policy review plan/new policy development plan to the Board of Trustees and in so doing provides the Board an opportunity to provide initial direction on the intent and scope of the identified policies prior to review or development.
2. The Superintendent of Schools shall convey the Board's policy purpose and provide guidance on the scope of each policy when issuing policy assignments to a Sponsor.
3. The Manager, in consultation with the Sponsor(s), Development Lead(s) and General Counsel, shall prepare a recommended annual policy review/new policy development plan on behalf of the Superintendent of Schools for the consideration of the Policy Review Committee. The plan shall include for each identified policy:
  - a. a statement of the purpose of the policy;
  - b. indication of alignment of the proposed policy to our Mission, Vision and Priorities;
  - c. level of impact of the policy for student learning and wellbeing;
  - d. identification of the level of stakeholder consultation appropriate for the policy topic and scope given the potential contentiousness of the policy topic, degree of impact on student learning and wellness, degree of impact on internal and external stakeholders and whether the policy is new or expected to be significantly revised; (see Board Policy AA.BP - Stakeholder Engagement); and
  - e. a policy development/review and approval timeline.

## B. POLICY DEVELOPMENT AND APPROVAL PROCESS

1. Once the annual policy review plan/new policy development plan is approved by the Board, the Development Lead and assigned staff shall implement the review/development plan. The Manager and General Counsel shall be available for consultation, questions, comment, attendance at working group meetings, or for review of drafts at any stage in the development.
2. The Development Lead shall draft the policy and develop a companion board report in recommendation format to the Policy Review Committee that summarizes or appends:
  - a. pertinent information from the policy review/development plan;
  - b. the research and development process used including internal and external stakeholders involved in the policy development to date;
  - c. identification of legislation, other board policies, and Division procedures and documentation which may impact or be impacted by the policy;
  - d. indication of how the proposed policy would be implemented; for example, development of a corresponding administrative regulation, communication of the policy and staff development;
  - e. indication of the accountability reporting to be used for the policy; for example, reporting on an exception basis, an item in the Superintendent of School's Evaluation, part of an annual monitoring report, a stand-alone annual report or an audit report;
  - f. an analysis of intended and possible unintended consequences of the policy and means of mitigating risk; and
  - g. any supporting data that may be helpful to the understanding of the Policy Review Committee and the Board.
3. The draft of the policy and companion recommendation report shall be routed for approval for submission to the Policy Review Committee having been reviewed and confirmed for compliance with the Framework for Policy Development and Review in the following order:
  - a. the Department with administrative responsibility
  - b. the Manager
  - c. General Counsel
  - d. the Sponsor
  - e. the Superintendent of Schools
4. The Sponsor or designate shall present the draft policy and companion recommendation report to the Policy Review Committee to determine next steps and/or approve submission to the Board for first consideration in accordance with Board Policy CH.BP - Framework for Policy Development and Review.
5. The Chair of the Policy Review Committee shall present and recommend the draft policy to the Board for first consideration to provide the Board the opportunity to seek clarification, request additional information and make changes to the draft policy prior to the policy being made available for online stakeholder feedback:
  - a. Following the Board's first consideration of the draft policy:
  - b. The Development Lead, in consultation with the Manager, shall update the draft policy if needed.
  - c. The Manager shall arrange for the draft policy and companion board report to be available for online stakeholder feedback for a minimum of four weeks.

6. The Development Lead shall review and summarize the stakeholder feedback received, recommend any changes to the policy, adjust the policy and companion board report as necessary and route for approval for submission to the Policy Review Committee.
7. The Policy Review Committee will be provided access to the raw stakeholder feedback received, and will review the policy and companion board report to determine next steps and/or approve submission to the Board for second consideration.
8. The Board will consider the draft policy for a second and third time for final approval. The Board may ask questions and make amendments to the policy during this process.

#### C. POLICY IMPLEMENTATION

1. After Board approval of the policy, the Manager, in consultation with Executive Director Governance and Strategic Support Services, shall finalize the formatting of the policy with the appropriate effective date and review year and post the policy on the Division's website in a policy directory.
2. The effective date of a Board policy shall be the date the Board approved the policy as recorded in the official minutes of the board meeting at which it was approved or a date specifically stated in the motion approving the policy.
3. Division Communications shall communicate new and revised policies through existing communication channels.
4. The Executive Director Governance and Strategic Support Services shall include assignment for policy implementation by the Superintendent of Schools in the District Support Team Follow-up to a board meeting at which a policy has been approved.
5. The Superintendent of Schools shall assign specific responsibility for:
  - a. targeted communication of a new policy or a change to an existing policy;
  - b. implementation of the policy through development or revision of administrative regulations and processes; and
  - c. subsequent monitoring of and reporting to Board on implementation.

#### REFERENCES

AA.BP - Stakeholder Engagement  
CH.BP - Framework for Policy Development and Review  
CHA.BP - Board Delegation of Authority  
IA.BP - Parent and Community Involvement  
Trustees' Handbook - Policy Review Committee Terms of Reference  
*Education Act* Sections 53, 222