



## **PERFORMANCE APPRAISAL OF NON-TEACHING STAFF**

### **GOVERNANCE POLICY**

#### **CONTENTS**

#### **1.0 PRINCIPLES**

#### **2.0 POLICY FRAMEWORK**

#### **3.0 AUTHORIZATION**

#### **1.0 PRINCIPLES**

- 1.1. The South Shore Regional Centre for Education (SSRCE) believes that the performance of the organization is directly linked to the performance of individual employees. The performance appraisal of all employees is essential to the achievement of quality educational experiences for all students in the SSRCE's care.
- 1.2. The SSRCE believes the performance appraisal process provides opportunities for staff development and encourages the professional growth of each staff member while acknowledging and affirming the efforts, involvement, and achievements of all employees. The performance appraisal process will strive to ensure that all employees perform in a competent and caring manner, value quality of learning for all students, and will support a positive, respectful, and safe environment that respects the cultural and individual differences of all individuals.

#### **2.0 POLICY FRAMEWORK**

- 2.1. This policy complies with the Education Act and other related provincial acts and policies.
  - 2.1.1. This policy applies to all non-teaching employees, with the exception of Senior Administration.
  - 2.1.2. The Performance Appraisal process will:
    - 2.1.2.1. Reflect specific dimensions of each position relevant to an approved job description for that position.
    - 2.1.2.2. Be a collaborative and interactive process.
    - 2.1.2.3. Provide an opportunity to review the job.
    - 2.1.2.4. Include a review of general performance standards.
    - 2.1.2.5. Endeavor to maintain and improve employee/job performance.
    - 2.1.2.6. Improve communication between the employee and their immediate Principal/Supervisor by providing an opportunity to provide specific feedback to individual employees on their job performance.
    - 2.1.2.7. Provide an opportunity for employees to reflect on their own performance and to set professional goals that will support professional growth and career planning.
    - 2.1.2.8. Assess employee training needs.
  - 2.1.3. Appraisal criteria will be based on the approved job description, which will be subject to an annual review as per SSRCE Policy 660: Job Descriptions and any relevant Collective agreement provisions.

**3.0 AUTHORIZATION**

3.1. The Regional Executive Director is authorized to issue procedures in support of this policy.

## PERFORMANCE APPRAISAL OF NON-TEACHING STAFF

### ADMINISTRATIVE PROCEDURES

#### CONTENTS

#### 1.0 PROCEDURES

#### 2.0 RESPONSIBILITIES

#### 1.0 PROCEDURES

##### 1.1. Process for Determining Frequency of Appraisal

##### 1.1.1. Frequency for Custodial Staff and Bus Drivers

1.1.1.1. Supervisory evaluation is an on-going process dedicated to continuous improvement and individual growth. Therefore, the supervisory performance appraisal will be conducted:

1.1.1.2. On an annual basis for all term and probationary employees

1.1.1.3. Every three (3) years for permanent staff;

1.1.1.4. At any time deemed necessary by the Supervisor; or

1.1.1.5. When the employee moves to a new classification.

##### 1.1.2. Frequency of All Other Employees

1.1.2.1. Evaluation is an on-going process dedicated to continuous improvement and individual growth. Therefore, the performance appraisal will be conducted as follows:

1.1.2.2. Term and probationary employees will undergo an annual evaluation by their Supervisor only.

1.1.2.3. A Supervisory evaluation will be performed once every four (4) years for permanent employees; or

1.1.2.4. At any time deemed necessary by the Supervisor; or

1.1.2.5. When the employee moves to a new classification.

1.1.2.6. And will include the development of a Professional Growth Plan (Appendix "A") in the years in which the Supervisory Appraisal process is not applicable.

##### 1.2. Process for Supervisory/Formative Appraisal

##### 1.2.1. Pre-Appraisal Conference

1.2.1.1. The performance appraisal process is a confidential process. The employee's immediate Principal/Supervisor, or designate, will be responsible for completing the process. The process for the appraisal will normally include the following components:

1.2.1.2. The Principal/Supervisor (appraiser), or designate will meet with the employee to explain the appraisal process as described in the appraisal instrument.

1.2.1.3. The current job description will be reviewed.

1.2.1.4. During the pre-appraisal conference, the appraisal will be reviewed and discussed for clarification. This will be an opportunity for input, feedback, and questions.

1.2.1.5. Realistic time-lines are established and adhered to.

- 1.2.2. Post-Appraisal Conference
  - 1.2.2.1. The Principal/Supervisor, or designate, shall meet with the employee to review their report within three weeks following the specified deadline for data collection. At the post-conference meeting, the appraiser and the employee will:
    - 1.2.2.2. Review the Supervisory Report.
    - 1.2.2.3. Provide an opportunity for feedback on/discussion of the forms & report.
    - 1.2.2.4. Discuss changes/improvements to the appraisal system.
    - 1.2.2.5. Review recommendations. Revisions may be made if applicable.
    - 1.2.2.6. If revisions are not necessary, the appraisal document may be signed by both parties at the conclusion of this meeting. If revisions are deemed necessary, another meeting will be held between the appraiser and employee to affix signatures to the final appraisal document.
    - 1.2.2.7. Signatures do not indicate agreement, simply that the form was reviewed and discussed. Comment sections are available for both parties to respond to the evaluation.
  - 1.2.2.8. Recommendations may include:
    - 1.2.2.9. Further training/development; or
    - 1.2.2.10. Movement to an individual plan to address serious issues, or
    - 1.2.2.11. Continuing focus on agreed upon professional growth goals, or
    - 1.2.2.12. The development of professional goals and/or performance improvement goals.
    - 1.2.2.13. Distribution of Report: The original signed Performance Appraisal Report, along with any letters of comment or rebuttal, will be forwarded to the Human Resources Department by the appraiser to be included in the employee's personal file. A copy of the signed Supervisory Report will be provided to the employee.
- 1.2.3. Disagreement with Formative Performance Appraisal
  - 1.2.3.1. In situations where the employee disagrees with aspects of their performance appraisal, the employee may send a formal letter of rebuttal to the Director of Human Resources that will be attached to the Supervisory appraisal.
- 1.3. Process for Personal Growth Plan
  - 1.3.1. In years in which a Supervisory Performance Appraisal is not applicable, employees will engage in performance planning and goal setting by completing a Professional Growth Plan (Appendix "A"). This is an opportunity for employees to reflect on their performance, to identify areas of professional strength, to focus on areas for growth and improvement, and to establish and prioritize goals that support their on-going professional development and growth.
  - 1.3.2. Professional Growth Plan Process
    - 1.3.2.1. The Principal/Supervisor, or designate, will meet with the employee to review the most current job description relevant to the employee's position.

- 1.3.2.2. The Principal/Supervisor, or designate, and the employee will review the Professional Growth Plan template (Appendix A) and will discuss each of the goals.
  - 1.3.2.3. A reasonable time-frame will be agreed upon for the employee to complete a Professional Growth Plan. A meeting date will be set for the Principal/Supervisor, or designate, and the employee to review the proposed plan. If revisions are deemed appropriate, the plan will be revised in a timely manner to facilitate the implementation of the plan. The Principal/Supervisor, or designate, and employee will sign the plan.
  - 1.3.2.4. A final meeting to review the outcomes of the plan will be arranged to take place at the end of the cycle. This meeting will be scheduled before May 15<sup>th</sup> in the school year. Both parties will sign the plan at the end of the cycle. The original plan will be filed in the employee's personal file; a copy will be provided to the employee.
  - 1.3.2.5. This aspect of the performance appraisal process will begin anew unless the employee is scheduled to participate in the Supervisory Performance Appraisal process; or the process is warranted as a result of the Performance Growth Plan, or the employee's job description has changed significantly.
- 1.4. Process for Summative Appraisal
- 1.4.1. If there are serious issues identified through the Supervisory process, the Principal/Supervisor may recommend that the Employee be moved to a summative process, which is outside of this appraisal and growth plan. The summative process is an individualized plan (Appendix B), developed with input from the Employee and the Principal/Supervisor, including the Director of Human Resources, or designate. It clearly outlines the performance issues, sets comprehensive goals, that will include supports offered, targets to be reached and a time line for follow up. Failure to meet the achievements outlined in the summative process may lead to discipline or dismissal.
  - 1.4.2. The Summative Process
    - 1.4.2.1. An initial meeting must be scheduled within 10 working days concluding the meeting to review the Supervisory appraisal. This meeting will include the Principal/Supervisor, the Employee and the Director of Human Resources or designate. The Employee should also be notified that they may invite their Union representative for support if they choose.
    - 1.4.2.2. A plan for improvement will be collaboratively developed by the Employee and the Principal/Supervisor, with the assistance of the Director of Human Resources or designate. This plan will include:
      - 1.4.2.3. Issues Identified
      - 1.4.2.4. Specific Goals
      - 1.4.2.5. Supports / Resources Provided
      - 1.4.2.6. Indicators of Success
      - 1.4.2.7. Timelines to demonstrate indicators of success
    - 1.4.2.8. At the meeting, follow up meetings will be scheduled to review the progress of the plan for improvement.
    - 1.4.2.9. The Director of Human Resources, or designate, will provide a summary of the meeting, the final plan for improvement and the follow up meeting dates,

in a letter to the Employee, copied to the Employee's Personnel file and the Principal/Supervisor, within 10 working days following the meeting.

- 1.4.2.10. The Director of Human Resources, or designate, will also provide summary letters following each follow up meeting and the concluding meeting. These letters will be addressed to the Employee, copied to the Employee's personnel file and the Principal/Supervisor.
- 1.4.2.11. The Director of Human Resources, or designate, will also provide summary letters following each follow up meeting and the concluding meeting. These letters will be addressed to the Employee, copied to the Employee's personnel file and the Principal/Supervisor.
- 1.4.2.12. At the concluding meeting, a recommendation will be made. If the indicators of success have been met, the Employee returns to the regular cycle outlined in this policy. If the Principal/Supervisor determines that insufficient progress has been made on the plan for improvement, a recommendation will be made for an individual decision on that employee.
- 1.4.2.13. An individual recommendation will include a meeting with the Employee, the Principal/Supervisor, the Director of Human Resources and /or designate and the Employee's Union representative.

## **2.0 RESPONSIBILITIES**

It shall be the responsibility of the Regional Executive Director to ensure these administrative procedures are followed.