GREATER ESSEX COUNTY DISTRICT SCHOOL BOARD

Policy: Performance Appraisal – Director of Education

Reference No: P-GV-09

The Greater Essex County District School Board believes that a performance appraisal review process for the Director of Education provides a forum for constructive dialogue and exchange of information between the Director and the Board of Trustees. Such a process is an opportunity for both the Board and the Director to clarify expectations and goals, to review past accomplishments, and to agree on needs and priorities of the system.

This process is directed by Ontario Regulation 83/24.

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Purpose

Ontario Regulation 83/24 sets out the mandatory assessment criteria that all school boards must use to complete their Director's annual performance appraisal.

Guiding Principles

The performance appraisal review process should give an accurate reading of the performance of the Director and establish agreement on the indicators for future success. It is understood that the process will be structured to evaluate the work of the Director, rather than the progress of the school system.

The complexity relating to the Director's accountability creates some challenges for the Board in providing useful and fair performance evaluations. Unlike all other employees of the GECDSB, the Director of Education, as head of the organization, does not have one direct supervisor. Rather, the Director is accountable to the Board, an elected entity of 10 school trustees. Therefore, the selected evaluation process must provide for full participation of the Board.

Performance Review Process

1. Establishing the DPA Committee

The DPA Committee shall consist of three (3) trustees to be elected at the inaugural or annual organization meeting or any other time that may be appropriate to the DPA process.

The committee will be responsible for evaluations between July 1 of the current year and June 30 of the following year, when that committee will be dissolved.

The Chair of the DPA Committee will be elected at the first meeting of the committee.

2. Timing of Evaluation Cycles:

a) Directors starting on or after July 1 in a year and on or before the last day of February in the following year will have an interim evaluation cycle ending on their first June 30, with their first full evaluation cycle beginning on July 1 following their start date.
b) Directors starting on or after March 1 in a year and on or before June 30 in that same year will have an interim evaluation cycle ending on June 30 in the following year and the first full evaluation cycle beginning on July 1 in the following calendar year.
c) After the first full or interim evaluation cycle, the Director of Education shall have full annual evaluations with the Board.

3. Actions During Evaluation Cycles:

a) Detailed steps and timelines for actions during both full and interim evaluation cycles are outlined in Appendix A and B, respectively.
b) An outside facilitator with at least five years experience in multi-source executive performance assessments will be hired. The facilitator will be mutually acceptable to both the Board of Trustees and the Director of Education.

I. The facilitator will coordinate the steps in the review process and will act as a liaison between the Board and the Director throughout the process.
II. The facilitator will compile the necessary information required to complete the performance evaluation of the Director in accordance with Ontario Regulation 83/24.
III. The facilitator will prepare an objective report for the Performance Appraisal Committee to present for approval to the Board of Trustees in Private Session.

4. Bi-Annual Feedback:

a) In the first full evaluation cycle and every second cycle thereafter, an external entity with at least five years of experience in multi-source executive performance assessments will be engaged to collect feedback and prepare a report.
b) In accordance with Regulation 83/24, feedback will be sought from:
    i. Each member of the Board
    ii. Each student trustee of the Board,
    iii. Each member of every statutory, ad hoc, or other committee of the Board
    iv. Each staff member of the board who reports directly to the Director of Education
    v. Each parent member of the school council at each school of the Board
    vi. A representative nominated by each local employee association representing employees of the Board
    vii. A representative sample of community partners and stakeholders, as identified by the committee with input from the Director of Education
    viii. If notice has been provided, the Minister of Education
c) The Director of Education and the DPA Committee will meet to discuss each group's areas of focus and the associated questions. Areas of focus and questions will vary by stakeholder.

5. Performance Plan and Appraisal:

a) A performance plan, including specific actions, goals, and evaluation methods, will be developed, finalized and update as needed.
b) The performance plan will include actions to achieve:
    i. Goals of the multi-year strategic plan,
    ii. Provincial priorities,
    iii. Management of human, capital and fiscal resources,
    iv. Promotion of a healthy and inclusive workplace,
    v. Creation and maintenance of respectful and collaborative relationships with stakeholders,
    vi. Leadership that maintains or improves the Board's reputation and confidence, and
    vii. Compliance with Ministry policies, guidelines and Board policy.
c) The performance plan will include leadership competencies and practices to achieve the goal and how they will improve at least one of the competencies or practices.
d) The committee will evaluate the Director's performance based on these plans and assign performance ratings as appropriate:
    i. Meets all expectations
    ii. Meets most expectations
    iii. Meets some expectations
    iv. Does not meet expectations.
e) The Committee will consider the following factors:
    i. The extent to which the Director of Education worked diligently and consistently toward the implementation of the actions identified in the performance plan,
    ii. The Director of Education's efforts to engage board staff, community partners and stakeholders, and others in developing the goals and implementing the actions identified in the performance plan,
    iii. The degree of success the Director of Education had in achieving the goals set out in the performance lan, as informed by data available to the board, including biannual feedback and school climate surveys, if applicable,

iv. The rationale provided by the Director of Education for the actions that were not implemented and the goals that were not achieved,
v. The effectiveness of efforts made to overcome challenges the Director of Education faced in implementing the actions identified in the performance plan,
vi. The demonstrated ability and willingness of the Director of Education to address, in the future, the actions that were not implemented and goals that were not achieved.

f) Documents required to be prepared by the board or provided to the board under Ontario Regulation 83/24 will be kept for a period of at least six years from the date of the draft performance appraisal report to which the document relates.

Appendix A: Detailed Timelines and Actions for Full Evaluation Cycle

Suggested Timelines	Responsibility	Task
By May 15	Board of Trustees	DPA Committee established
By July 31	DPA Committee	DPA Chair + 1 DPA member meet with the Director of Education to develop/finalize the Director's performance plan
By August 15	DPA Chair	Director's performance plan is shared with all members of the Board of Trustees
By August 15	Chair of the Board	Provide written notice to the Minister of Education (confirmation of the date of hire, if a bi-annual feedback opportunity, and confirmation of performance plan) and post the notice on the Board's website.
By December 1	Minister	Minister provides written notice if they will engage in providing feedback (during the process).
By January 11	DPA Chair	Requests feedback from each member of the Board of Trustees
By January 21	Board of Trustees	Each member provides their feedback to the DPA Chair
By January 31	DPA Chair	DPA Chair + 1 DPA member meet with the Director of Education to review the Director's progress towards implementing and achieving the goals of the performance plan.
By March 15	Board of Trustees	The Board of Trustees select an entity to conduct the bi-annual feedback. Starting in the first full evaluation cycle and every second full evaluation cycle thereafter
By April 10	Bi-Annual Feedback Consultant (when applicable)	Written report provided to the DPA Committee and Director of Education
By May 1	Director of Education	Updating of Performance Plan
By May 10	DPA Chair	Provides a draft performance appraisal report to each member of the Board of Trustees
By May 17	Each member of the Board of Trustees	Provides feedback on the draft performance appraisal report to the DPA Chair
By May 24	DPA Chair	Provides the draft performance appraisal report to the Director of Education

By June 1	DPA Chair	DPA Chair + 1 DPA member meet with the Director of Education to review the progress of the Director's Performance Plan, update the plan for the next cycle, review the draft Performance Appraisal Report and provide an opportunity for the Director of Education to respond
By June 10	DPA Committee	Finalize the performance appraisal report taking into consideration feedback from members of the Board and Director of Education. Provide a final copy to the Board and Director of Education
June Special Committee of the Whole – Closed Session	Board of Trustees	Pass a Board Resolution that the Director's performance appraisal is approved.
By June 30	Chair of the Board	Provide written confirmation to the Minister that the performance appraisal report has been adopted by a Board resolution and include a list of community partners from whom feedback was requested (if in a full or bi-annual cycle) and post a copy of this confirmation and stakeholder list on the board's website

Appendix B: Detailed Timelines and Actions for Interim Evaluation Cycle

Suggested Timelines	Responsibility	Task
30 Days after start date By September 30	DPA Committee	DPA Chair + 1 DPA member meet with the Director of Education to develop/finalize the Director's performance plan
45 Days after start date By October 15	DPA Chair	Director's performance plan is shared with all members of the Board of Trustees
45 Days after start date By October 15	Chair of the Board	Provide written notice to the Minister of Education (confirmation of the date of hire and confirmation of performance plan) and post the notice on the Board's website.
45 Days after start date By October 15	Minister	Minister provides written notice if they will engage in providing feedback (during the process).
By January 7	DPA Chair	Requests feedback from each member of the Board of Trustees
By January 22	Board of Trustees	Each member provides their feedback to the DPA Chair
By February 5	DPA Chair	DPA Chair + 1 DPA member meet with the Director of Education to review the Director's progress towards implementing and achieving the goals of the performance plan.
By May 1	Director of Education	Updates performance plan
By May 10	DPA Chair	Provides a draft performance appraisal report to each member of the Board of Trustees
By May 17	Each member of the Board of Trustees	Provides feedback on the draft performance appraisal report to the DPA Chair
By May 24	DPA Chair	Provides the draft performance appraisal report to the Director of Education
By June 1	DPA Chair	DPA Chair + 1 DPA member meet with the Director of Education to review the progress of the Director's Performance Plan, update the plan for the next cycle, review the draft Performance Appraisal Report and provide an opportunity for the Director of Education to respond
By June 10	DPA Committee	Finalize the performance appraisal report taking into consideration feedback from members of the board and director of education. Provide a final copy to the board and Director of Education

June Special Committee of the Whole – Closed Session	Board of Trustees	Pass a Board Resolution that the Director's performance appraisal is approved.
By June 30	Chair of the Board	Provide written confirmation to the Minister that the performance appraisal report has been adopted by a Board resolution and post a copy of this confirmation on the board's website.