

POLICY

It is the policy of the Upper Grand District School Board to require regular performance appraisal of its employees through ongoing supervision and formal evaluation.

Administrative Detail

1. It is the responsibility of the appropriate Superintendent to administer, implement and monitor this policy.
2. It is the responsibility of the appropriate evaluator to ensure compliance with relevant Legislation and Regulations, and to the timelines and processes outlined in the Performance Appraisal Handbooks.
3. This policy will be implemented in accordance with the Performance Appraisal Procedures Manual 410-A, and the Board's Municipal Freedom of Information and Protection of Privacy Act Guidelines and Procedures.
4. This policy will be consistent with the requirements of relevant Legislation and Regulations, Collective Agreements and General Conditions of Employment.

A. INTRODUCTION

Performance appraisal is an ongoing process that encourages and sustains professional growth. Through a collaborative approach, and with clear performance expectations, the process fosters the optimum performance of all staff to promote high quality education for students.

B. PURPOSES

1. Promote effective performance of employees.
2. Promote individual growth and professional development of employees.
3. Promote effective delivery of program and services to students.
4. Generate data that may be required to support personnel decisions such as:
 - a) exchange;
 - b) promotion;
 - c) placement;
 - d) tenure;
 - e) discipline;
 - f) demotion, or
 - g) dismissal.

C. GLOSSARY OF TERMS

1. **Supervision** is the continuous, formal and informal process of observation and notation of an employee's performance.
2. **EVALUATION**
 - a) **Formative Evaluation** is a continuous process aimed at improved performance and job satisfaction. It *"focuses on improvement in future performance and the potential for*

employee growth by means of coaching, counselling, goal setting, and attempting to motivate the employee to be more productive, effective, efficient and/or satisfied".¹

- b) **Summative Evaluation** generates a clear perception of the overall effectiveness of the performance of an individual. It sums up all aspects of performance observed over a defined period of time. This aspect of performance appraisal contributes to *"administrative decisions related to promotion, salary increases, retention, dismissal, discipline, and human resource planning".²*
 - c) **Formal Evaluation** is prescribed and periodic. Although it is mainly summative in nature it also includes a formative component.
3. **THE PROFESSIONAL GROWTH PLAN or ANNUAL LEARNING PLAN** is self-generated by an employee, in consultation with a supervisor/colleague, to facilitate improved performance by the employee and to encourage individual professional development.
 4. **THE REVIEW MODE** is the stage of formal evaluation that will lead either to improved employee performance or to the discipline, demotion, termination of contract or dismissal of the employee. It is understood that the Review Mode applies to non-culpable, substandard work performance and not to culpable misconduct.
 5. **THE EVALUATION INSTRUMENT** is the set of parameters specific to an employee group, which will be used, in the formal evaluation of the employee.
 6. **H01** is the Upper Grand District School Board's file code used to identify the employee's records in the Human Resources Department.

¹ D. A. Ondrack, and C. Oliver, **A Review of Analysis of Performance Appraisal Processes, Vol. 1; A Review of the Literature** (Toronto: Queen's Printer, 1986) 11.

² Ondrack 10.

An H01 file is kept active for the period of actual employment with the Board. When the employee ceases to be employed with the Board, the H01 file becomes inactive.

D. CYCLE OF PERFORMANCE APPRAISAL

1. Professional Growth

Through a process of self-assessment, goal setting and ongoing supervision, assisted by formative (informal and supportive) evaluation, the professional growth of the employee is encouraged and facilitated. The employee, collaboratively with the appropriate supervisor/colleague, will prepare, implement, monitor and evaluate professional growth plan or annual learning plan each year.

2. Formal Evaluation

Employees will be formally evaluated and receive summative reports from the appropriate supervisor as outlined in Appendix A. The reports will become part of the employee's H01 file and will facilitate professional growth, enhance performance and assist in employment decisions.

3. Process

The specific steps and forms for the development of a professional learning plan or annual learning plan and evaluation steps are in the various handbooks attached to this policy. The steps in evaluation generally involve a planning step, observations and the collection of data and the sharing of a summative report. The process should be as collaborative as possible.

**FORMAL EVALUATION CYCLES
For
NON-PROBATIONARY EMPLOYEES
(unless altered by Regulation)**

GROUP	FREQUENCY	EVALUATOR
Director of Education	Yearly	Board
Superintendents	Yearly	Director of Education
Principals/Vice-Principals	* 3 Years	Superintendent/Principal
Teachers & Temporary Teachers Classroom, Library, Guidance, Special Education	Elementary 4 Years	Principals/Superintendent Or Designate
Curriculum Leaders, Consultants Co-ordinators, Itinerants	Secondary 3 Years	
Continuing Education Teachers & Temporary Teachers Instructors, Community Co-ordinators	4 Years	Principal/Vice-Principal
Occasional Teachers	As needed	Principal/Vice-Principal
Professional Student Services Personnel Psychology/Social Work, Attendance & Counselling, Speech & Language Child and Youth Counsellors	4 Years	Supervisor Principal/Vice-Principal
Office, Clerical and Technical	4 Years	Supervisor
Special Program and Educational Assistants	4 Years	Principal/Vice-Principal
CUPE Maintenance, Caretaker, Cleaner Apprentice	4 Years	Supervisor
Contract Employees	Once in Term of Contract	Supervisor
Administrative Employees	4 Years	Supervisor

* Once in the first year; then follow the frequency as indicated above.