



PERFORMANCE APPRAISALS FOR NON-TEACHING STAFF #300.06

Adopted:	October 10, 2004
Last Reviewed/Revised:	June 2024
Responsibility:	Superintendent of Education
Next Scheduled Review:	2028

POLICY STATEMENT:

The Brant Haldimand Norfolk Catholic District School Board believes that performance appraisal of all employees is essential to the achievement of its commitment to provide quality educational experiences for all students in its care. The performance appraisal process provides opportunities for staff development and encourages professional growth. The performance appraisal process aims to maintain and improve employee/job performance while supporting staff and acknowledging and affirming their efforts, involvement, and achievements.

APPLICATION AND SCOPE:

This Policy and Administrative Procedure has been developed to clarify roles and responsibilities regarding Performance Appraisals for Managers, Supervisors, and all non-teaching staff. It will provide direction to supervisors with respect to their duties, responsibilities and required processes in assisting employees in knowing what is expected of them in terms of job performance, assessing areas of growth and training needs and the provision of corrective instruction, counseling, and coaching in order to promote effective job performance.

REFERENCES:

Education Act, R.S.O. 1990

[HRS 300.11.P - Hiring Non-Academic Staff](#)

[HRS 300.18.P - Pre-Employment Screening.pdf](#)

[HRS 300.19.P - Progressive Discipline](#)

FORMS:

Form 1: Summative Report: *Management Staff Performance Evaluation Form*

Form 2: Summative Report: *Non-Teaching Staff Performance Evaluation Form*

APPENDICES:

N/A

DEFINITIONS:

Formative Evaluation: ongoing communication between the evaluator and employee.

Summative Evaluation: the written report evaluating the performance of the employee against established standards.

Under Review: status of an employee subject to an individual improvement plan based on areas identified as unsatisfactory during the summative evaluation.

Probationary Employees: new hires to the Board are under probation for a period of time identified in the respective collective agreement, or terms and conditions of employment.

Permanent Employee: an employee that has successfully completed their probationary term.



ADMINISTRATIVE PROCEDURES:

1.0 Purpose of the Performance Appraisal Program for Staff

- 1.1 The primary purpose of the Performance Appraisal Program is to assist employees in achieving their employment goals, provide opportunity for professional growth and to maintain and improve employee/job performance.
- 1.2 The process is designed to:
 - 1.2.1 assist employees in knowing what is expected of them in terms of job performance
 - 1.2.2 provide corrective instruction, where warranted, in order to promote effective job performance
 - 1.2.3 improve communication between the employee and the principal/supervisor by giving an opportunity to provide rich and authentic feedback to individual employees on their job performance
 - 1.2.4 assist in placement decisions and career planning and development for individual employees.
 - 1.2.5 identify employee training needs

2.0 Documentation

- 2.1 All employees and supervisors will use the required Board process and software to complete the performance appraisals.
- 2.2 Appraisals will be completed by May 15 in the employee's appraisal year.
- 2.3 A copy will be stored in accordance with the Board's record retention guidelines:
 - 2.3.1 Personnel File – original
 - 2.3.2 Employee – copy
 - 2.3.3 Principal/Supervisor – copy

3.0 Formative Evaluation

- 3.1 Employee performance support extends beyond the cycle of formal evaluations. Effective ongoing communication between the evaluator and employee support employee growth and development.
- 3.2 Supervisors are expected to regularly interact, observe, and discuss employment expectations, goals, and best practices on an ongoing basis with each employee.
- 3.3 Supervisors should take an asset-based approach to develop strengths and to recognize and expand upon effective performance.
- 3.4 Where improvement is necessary, the evaluator should make clear and specific recommendations for improvement. The supervisor must clearly articulate what is expected of the employee and a timeline for improvement.
- 3.5 The supervisor must investigate resources, training and/or opportunities for re-instruction to address any deficiencies and offer those supports to the employee experiencing difficulties.
- 3.6 Although written reports are not specifically required for formative evaluation, it is understood that written documentation provides effective communication between the supervisor and the employee and is necessary for two-way understanding.

4.0 Formal Performance Appraisal - Summative Report

4.1 Frequency

- 4.1.1 Probationary: Employees receive a minimum of one performance appraisal summative report before the end of the probationary period.
- 4.1.2 Employees in Temporary Positions: For a permanent or casual employee in a temporary position outside of their own job classification for a period of four (4) months or longer, a performance appraisal summative report will be prepared once prior to the conclusion of the assignment. A supervisor may conduct a performance appraisal for casual employees in shorter term assignments.
- 4.1.3 Permanent Employees: Minimum of one performance appraisal summative report every five (5) school years, recognizing that formative evaluation is on-going or at any time, the supervisor may deem it necessary to conduct a performance appraisal and summative report.
- 4.1.4 When a major change has occurred in the employee's job description, the supervisor may deem it necessary to conduct a performance appraisal and summative report.



4.2 Responsibilities of the Appraiser

- 4.2.1 Principals/Supervisors will evaluate employee performance based upon the requirements of the position as stated in the employee's job description.
- 4.2.2 The expected standards of performance must be made known to the employee prior to the evaluation process.
- 4.2.3 The performance of the employee is evaluated against the established standards of performance for the job. A written summative report of this evaluation will be provided to the employee using the Non-Teaching Staff Performance Appraisal (Form 1) or Management Staff Performance Appraisal (Form 2).
- 4.2.4 The rating of an employee's summative performance appraisal is based upon the ongoing formative evaluation(s) described above and direct observation.
- 4.2.5 The evaluator shall discuss observations with the employee and shall provide written, dated copies of the report.
- 4.2.6 The employee will be requested to sign the report to acknowledge receipt.
- 4.2.7 The person who is responsible for supervising the employee will generally conduct the performance appraisal.
- 4.2.8 In special circumstances the supervisory officer responsible for the department/school may, at his/her discretion, assign another supervisor to conduct the evaluation (e.g. prolonged absence of the evaluator).
- 4.2.9 At the discretion of the school principal, the vice-principal may be assigned the duty of the performance appraisal for some, or all the support staff assigned to his/her school.
- 4.2.10 A supervisor/principal will not conduct a performance evaluation on an employee for which there is a conflict of interest (e.g. a family member).

5.0 Process for Conducting Summative Evaluations

5.1 Pre-Evaluation Meeting

- 5.1.1 Human Resource Services will provide each principal/supervisor with the names of employees due for performance appraisal summative evaluation reports at the beginning of the school year.
- 5.1.2 Supervisors will meet with employees (pre- evaluation meeting) to outline the process and advise that this is a period in which they will receive a performance appraisal summative evaluation report.
- 5.1.3 The principal/supervisor will ensure that the employee has a copy of their job description and the Board's performance appraisal program for non-teaching staff.
- 5.1.4 The principal/supervisor will review the job description and job expectations with the employee.
- 5.1.5 Employees will inform their principal/supervisor at the pre-evaluation meeting if they require accommodation for reasons of disability during the Performance Appraisal process. Once aware, the principal/supervisor will consider an employee's accommodation needs during the process.

5.2 Observation

- 5.2.1 If direct observation is required, the supervisor/principal will schedule the observation date at least two weeks in advance of the observation visit or at a mutually agreed upon date.

5.3 Summary Meeting

- 5.3.1 The Supervisor/Principal will schedule and conduct a meeting with the employee to review and discuss the summative performance evaluation report. This meeting shall be conducted discretely with a minimum notice period of two days.
- 5.3.2 At the conclusion of the performance appraisal discussion, the principal/supervisor and employee will discuss and identify goals that can be achieved by the employee within a reasonable period of time. The employee will be given the opportunity to complete the *employee comments* section and sign the form indicating acknowledgment that the discussion occurred and that he/she has read and received a copy of the evaluation report.
- 5.3.3 Summative reports for employees in temporary positions, as specified in Article 6, shall be filed as outlined above within four weeks of the conclusion of the temporary assignment.



5.4 Under Review Status

- 5.4.1 If an employee's overall job performance is rated as unsatisfactory, the employee will be placed under review.
- 5.4.2 In consultation with the appropriate Human Resource Services Coordinator, the supervisor will meet with the employee to create a Performance Improvement Plan.
- 5.4.3 Following the implementation of the Performance Improvement Plan, the supervisor will conduct a subsequent appraisal.

Brant Haldimand Norfolk Catholic District School Board Management Staff Performance Appraisal Form

Employee Name: _____
Supervisor's Name: _____

Position: _____
Evaluation Period: _____

RATING SCALE

- 1 Unsatisfactory – Performance does not meet expectations.
- 2 Needs Improvement – Performance sometimes meets expectations.
- 3 Good – Performance meets requirements and satisfies the expectations of the position.
- 4 Very Good – Performance consistently meets and often exceeds expectations.
- 5 Excellent – Performance consistently superior and exceeds expectations.

STANDARDS OF PERFORMANCE	Rating	COMMENTS
Job Knowledge & Skills		
Demonstrates an understanding of job duties and responsibilities as stated in the job description.		
Understands the job's relationship with and impact on other functions within the organization.		
Possesses the knowledge required to perform the job effectively.		
Possesses the technical skills required to perform the job effectively.		
Demonstrates an understanding of policies, procedures, statutes and regulations, as necessary, to perform the job.		
Is able to formulate solutions effectively within the scope of the job.		
Quality/Quantity Of Work		
Work is completed with minimal errors.		
Produces the expected volume of work.		
Demonstrates effective application of both technical and non-technical skills as required in the job description.		
Uses technology/resources available to achieve quality, service and productivity.		

STANDARDS OF PERFORMANCE	Rating	COMMENTS
Interpersonal Skills		
Demonstrates the ability to work effectively with people at all levels in the organization, including community partners. (e.g. shows respect, understanding, sensitivity, courtesy, tact and flexibility)		
Communicates effectively with people at all levels in the organization.		
Understands the role of listening in the communication process.		
Provides and receives feedback effectively at all levels of the organization.		
Maintains confidentiality at all levels of the organization.		
Planning & Organization		
Demonstrates the ability to organize the workload efficiently and effectively.		
Demonstrates the ability to establish and meet deadlines.		
Demonstrates the ability to establish and meet short and long-term goals.		
Possesses the flexibility to modify plans in order to meet changing needs and/or priorities.		
Decision Making		
Recognizes when a decision is needed and demonstrates the ability to make a sound decision.		
Evaluates known facts, develops a thoughtful plan of action and follows through.		
Recognizes when a higher authority should be consulted in respect to decision making.		
Initiative		
Is a self-starter in seeking responsibilities, work and new learning experiences		
Demonstrates the ability to work with minimal supervision.		
Recognizes and acts on opportunities.		
Innovation & Change		
Identifies, shares and is receptive to new ideas.		
Adapts to new situations.		
Helps others adapt to change.		

STANDARDS OF PERFORMANCE	Rating	COMMENTS
Suggests new procedures to increase efficiency of the position/department.		
Contributes new ideas and methods of dealing with problems.		
Health & Safety		
Demonstrates appropriate knowledge of health and safety practices/procedures in the workplace.		
Follows all safety rules, practices and procedures.		
Uses and maintains equipment properly.		
Supports safety by keeping the workplace clean and safe.		
Teamwork		
Promotes and demonstrates trust, mutual respect and a co-operative work environment.		
Balances the needs of the organization and team with one's own needs and desires.		
Supports teamwork through open and honest communication.		
Encourages and recognizes the contributions of others.		
Offers assistance to others.		
Demonstrates the ability to resolve conflict within the team.		
Demonstrates reliability/dependability		
MANAGEMENT LEVEL – This section evaluates the performance of the supervisory/management functions of the position.		
Delegation		
Delegates daily work assignments according to areas of expertise and responsibility, and consistent with established methods and procedures.		
Provides guidance and suggestions, when necessary.		
Encourages members of work groups to find own solutions to problems.		
Conducts follow-ups to ensure that work is completed accurately and on schedule.		
Leadership		
Sets high team standards.		
Establishes a focus and direction for the team.		
Creates a positive work environment.		
Develops a shared sense of purpose for the team.		
Motivates directly reporting employees.		

STANDARDS OF PERFORMANCE	Rating	COMMENTS
Communication		
Passes supervisor's instructions to members of work groups and provides clear instructions regarding new projects and assignments.		
Keeps supervisor informed of work progress and any problems, which occur.		
Reports personnel difficulties to supervisor.		
Project Management		
Establishes project goals and milestones		
Develops procedures and systems.		
Defines roles and responsibilities.		
Determines project resources.		
Monitors project performance.		
People Development/Management		
Fosters growth and develops the abilities of employees.		
Provides guidance, support, feedback and coaching to employees.		
Defines roles and responsibilities.		
Trains new employees by explaining routines, work procedures, use of equipment or machinery, and explaining precedents and past decisions.		
Health & Safety		
Ensures that employees comply with the Occupational Health & Safety Act & Regulations.	Y / N	
Ensures that employees wear personal protective equipment when required.	Y / N	
Advises employees of potential or actual health and safety hazards of which the supervisor is aware.	Y / N	
Takes every precaution reasonable in the circumstances for the protection of the workers.	Y / N	

Additional Standards:

Overall Performance:

OVERALL RATING OF PERFORMANCE

- Unsatisfactory (Performance Improvement Plan required)
- Development Needed (Performance Improvement Plan may be required)
- Good
- Very Good
- Excellent

SUPPORTING EMPLOYEE DEVELOPMENT

1. Discuss and identify goals that can be achieved by the employee.

[Empty box for employee development goals]

2. For Unsatisfactory and Development Needed Ratings, identify areas for development that will be addressed in the Performance Improvement Plan.

[Empty box for development areas]

EMPLOYEE COMMENTS

[Empty box for employee comments]

Supervisor's Signature

Date _____

Employee's Signature

The employee acknowledges that he/she has received and read the appraisal.

Distribution: Original: Personnel File

Copies: Employee
Principal/Supervisor

Brant Haldimand Norfolk Catholic District School Board Non-Teaching Staff Performance Appraisal Form

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Demonstrates an understanding of policies, procedures, statutes and regulations, as necessary, to perform the job.		
Formulates solutions effectively within the scope of the job.		
Quality/Quantity Of Work		
Completes work with minimal errors.		
Produces the expected volume of work in a timely manner.		
Demonstrates effective application of both technical and non-technical skills as required in the job description.		
Uses technology/resources available to achieve quality, service and productivity.		

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Supports safety by keeping the workplace clean and safe.	Y / N	
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EMPLOYEE COMMENTS

Supervisor's Signature

Date _____

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Copies: Employee
Principal/Supervisor

Employee's Signature

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