



**DURHAM CATHOLIC
DISTRICT SCHOOL BOARD**
Learning and Living in Faith

ADMINISTRATIVE PROCEDURE – 204-1

Director of Education Performance Appraisal

Area: Governance
Policy Reference: Director of Education Performance Appraisal (PO204)
Approved: June 17, 2024
Revised:

1. Purpose

The purpose of this administrative procedure is to outline the specific processes, timelines and tools/resources required for the completion of the Director's Performance Appraisal (DPA) as well as the responsibilities of the Board of Trustees and the DPA Committee (the "Committee") as established in accordance with PO204 Director of Education Performance Appraisal.

2. Definitions

Community Partners and Stakeholders (*Ontario Regulation 83/24 Director of Education Performance Appraisal*) – persons or entities that interact with a board, including advocacy groups, First Nations, Métis and Inuit partners, business and labour organizations, municipal and childcare partners and social services agencies.

Evaluation Cycle (*Ontario Regulation 83/24 Director of Education Performance Appraisal*) – the period of time during which the performance of a director of education is appraised.

Full Evaluation Cycle (*Ontario Regulation 83/24 Director of Education Performance Appraisal*) – an evaluation cycle that commences July 1 in a year and ends June 30 of the following year.

Interim Evaluation Cycle (*Ontario Regulation 83/24 Director of Education Performance Appraisal*) – an evaluation cycle determined in accordance with section 4 of Ontario Regulation 83/24.

3. Procedures

3.1 Timing of Evaluation Cycles

- 3.1.1 The type of evaluation cycle to be completed is dependent upon the start date of the Director as follows:
- a) When a new director of education has a start date that falls between July 1 in a year and the last day of February in the following year, the director shall:
 - i. have an interim evaluation cycle that begins on their start date and ends not later than the first June 30 following their start date; and
 - ii. have a first full evaluation cycle that begins not later than the first July 1 following their start date.
 - b) When a new director of education has a start date between March 1 and June 30 in the same year, the director shall:
 - i. have an interim evaluation cycle that begins on their start date and ends not later than June 30 in the following calendar year; and
 - ii. have a first full evaluation cycle that begins not later than July 1 in the following calendar year.

3.2 Interim Evaluation Cycle Requirements

- 3.2.1 The following actions shall be taken during an interim evaluation cycle:
- a) On the date that is 30 days after the Director's start date, the Committee Chair and at least one other member of the Committee will meet with the Director of Education to develop and finalize their performance plan;
 - b) On the date that is 45 days after the Director's start date the Committee Chair shall:
 - i. provide a copy of the Director of Education's performance plan to every member of the Board of Trustees; and
 - ii. provide written notice to the Minister of Education containing the following information:
 - the date that the person began in their role as director of education for the Durham Catholic District School Board (the "Board"), and
 - confirmation that the Director of Education's performance plan has been put in place for the current evaluation cycle; and
 - post a copy of the confirmation on the Board's website.
 - c) On the weekday closest to the date that is the midway point between the start and end date of the interim evaluation cycle, the Committee Chair and at least one other member of the Committee will:
 - i. Meet with the Director of Education to review their progress toward implementing the actions and achieving the goals contained in the

performance plan and discuss other matters relevant to the performance plan.

- d) Twenty (20) days prior to the meeting outlined in 3.2.1 (c)(i), the Committee Chair will:
 - i. Request feedback from every member of the Board of Trustees in respect of the Director of Education's progress toward implementing the actions and achieving the goals contained in the performance plan and to discuss other matters relevant to the performance plan.
 - ii. Stipulate that all feedback provided must be received by the Committee Chair no later than 10 days prior to the meeting outlined in 3.2.1 (c)(i)
- e) Not later than June 10, the Director of Education will update the performance plan to include:
 - i. confirmation of which actions listed in accordance with section 3.5.1 (a) have been implemented during the evaluation cycle; and
 - ii. a description of how each action that was implemented assisted in achieving the goals listed in section 3.5.1 (a)(i-vii), as applicable; and
 - iii. provide a rationale for any actions that were not implemented.
- f) Not later than June 20, the Committee Chair will provide a draft copy of the performance appraisal report, prepared in accordance with section 3.6 to every member of the Board of Trustees.
- g) Not later than the earlier of June 30 or ten (10) days after the receipt of the draft performance appraisal from the Committee Chair, each member of the Board of Trustees will provide any feedback on the draft performance appraisal to the Committee.

3.3 Full Evaluation Cycle Requirements

3.3.1 The following actions shall be taken during a full evaluation cycle:

- a) On or before July 31 the Committee Chair and at least one other member of the Committee shall meet with the Director of Education to develop and finalize their performance plan.
- b) On or before August 15 the Committee Chair will:
 - i. Provide a copy of the Director of Education's performance plan to every member of the Board of Trustees; and
 - ii. Provide written notice to the Minister of Education that includes the following information:
 - the date that the person began in their role as Director of Education for the Board; and

- whether the current evaluation cycle will require the collection of feedback from community partners and stakeholders; and
 - confirmation that the Director of Education's performance plan has been put in place for the current full evaluation cycle.
- iii. Post a copy of the confirmation on the Board's website.
- c) During full evaluation cycles which require the collection of feedback from community partners and stakeholders, on or before December 1, the Minister of Education will provide written notice to the Board of Trustees and the Director of Education indicating whether the Minister intends to provide feedback.
- d) On or before January 11 the Committee Chair will:
- i. Request feedback from every member of the Board of Trustees in respect of the Director of Education's progress toward implementing the actions and achieving the goals contained in the performance plan; and
 - ii. Stipulate that all feedback will be received by the Committee Chair by January 21 or 10 days after the Committee Chair makes the request (whichever is earlier).
- e) On or before January 31 the Committee Chair and at least one other member of the Committee will:
- i. Meet with the Director of Education to review their progress toward implementing the actions and achieving the goals contained in the performance plan and to discuss other matters relevant to the performance plan.
- f) During full evaluation cycles which require the collection of feedback from community partners and stakeholders, on or before April 30, such feedback will be collected in accordance with section 3.7.
- g) On or before June 10 the Director of Education will update the performance plan to include:
- i. confirmation of which actions listed in accordance with section 3.5.1 (a) have been implemented during the evaluation cycle; and
 - ii. a description of how each action that was implemented assisted in achieving the goals listed in section 3.5.1 (a)(i-vii), as applicable; and
 - iii. provide a rationale for any actions that were not implemented.
- h) On or before June 20 the Committee Chair will provide a draft copy of the performance appraisal report, prepared in accordance with section 3.6 to every member of the Board of Trustees.

- i) On or before the earlier of June 30 or ten (10) days after the receipt of the draft performance appraisal from the Committee Chair, each member of the Board of Trustees will provide any feedback on the draft performance appraisal to the Committee.

3.4 Actions to be Taken After Interim or Full Evaluation Cycles

- 3.4.1 On or before July 7 the Committee Chair will provide the draft performance appraisal report for the interim or full evaluation cycle to the Director of Education.
- 3.4.2 On or before July 31 the Committee Chair and at least one other member of the Committee will meet with the Director of Education to:
 - a) review the actions implemented by the Director of Education to achieve the goals contained in the performance plan and discuss other matters relevant to the performance plan;
 - b) review and update the Director of Education's performance plan for the next evaluation cycle;
 - c) review and discuss the Committee's draft performance appraisal report; and
 - d) provide the Director of Education with an opportunity to respond to the Committee's evaluation, performance rating and explanation for the rating.
- 3.4.3 On or before August 10 the Committee will:
 - a) finalize the performance appraisal report, taking into consideration, among other things:
 - i. the feedback from members of the Board of Trustees and the Director of Education;
 - ii. feedback obtained from community partners and stakeholders, if applicable; and
 - iii. school climate survey information, if applicable.
 - b) provide the final performance appraisal report to the Board of Trustees and the Director of Education.
- 3.4.4 On or before August 15 the Board of Trustees will:
 - a) provide written confirmation to the Minister of Education that the performance appraisal for the interim or full evaluation cycle, as applicable, has been conducted and that the final performance appraisal report has been adopted by board resolution.

- b) Where the full evaluation cycle included community partner and stakeholder feedback, provide the Minister of Education with a list of the community partners and stakeholders identified by the Committee from whom feedback was requested; and
- c) post a copy of the confirmation and, if applicable, the list of community partners and stakeholders from whom feedback was requested on the Board's website.

3.5 Performance Plan

3.5.1 The Director of Education's Performance Plan will be developed using the forms and tools for Catholic Director of Education Performance Appraisal process developed by OCSTA and will include:

- a) A list of actions that will be implemented by the Director of Education during the evaluation cycle to achieve the following goals:
 - i. Promote Catholic identity by nurturing Catholic community, culture, and Christian service in the Board.
 - ii. Advance the provincial priorities in education in the area of student achievement set out in Ontario Regulation 224/23 (Provincial Priorities in Education – Student Achievement).
 - iii. Manage human, capital and fiscal resources to achieve the goals identified in the board's multi-year plan developed in accordance with section 169.1 (1) (f) of the Education Act.
 - iv. Promote a healthy and inclusive workplace with an effective system for staff selection and oversight.
 - v. Create and maintain respectful and collaborative relationships with students, parents/guardians/caregivers, staff, school board communities, community partners and stakeholders, Ministry staff and the Minister.
 - vi. Demonstrate leadership that maintains or improves the reputation of, and public confidence in, the Board.
 - vii. Ensure compliance with applicable laws, Ministry policies and guidelines and Board mandates.
- b) Identification of leadership competencies and practices needed to achieve goals outlined in 3.1.5 (a) and actions that the Director of Education will implement during the evaluation cycle to improve at least one of those competencies/practices.
- c) One or more methods of determining successful implementation of the actions set out in the performance plan, and measuring qualitatively or quantitatively the degree to which the actions achieved the goals outlined in 3.1.5 (a).
- d) Professional development activities that the Director of Education will undertake related to the identified actions for the evaluation cycle.

- 3.5.2 The performance plan will be signed by the Director of Education and the Committee Chair, and a copy will be retained by each for at least six (6) years.

3.6 Performance Appraisals and Ratings

- 3.6.1 The Committee shall conduct a performance appraisal of the Director of Education in accordance with Policy PO204, its attendant Administrative Procedures, Ontario Regulation 83/24 and guidelines as issued by the Minister of Education.
- 3.6.2 The performance of a director of education shall not be evaluated in respect of the following periods:
- a) A period when the Director of Education is on extended leave that has been approved by the Board of Trustees.
 - b) A period when the Director of Education is on secondment to a position other than that of Director of Education.
- 3.6.3 Based on the results of the performance appraisal, the Committee shall assign one of the following performance ratings to the Director of Education:
- a) Meets all expectations.
 - b) Meets most expectations.
 - c) Meets some expectations.
 - d) Does not meet expectations.
- 3.6.4 When determining which performance rating to assign to the Director of Education, the Committee shall consider the following factors:
- a) The extent to which the Director of Education worked diligently and consistently toward the implementation of the actions identified in the performance plan.
 - b) The efforts made by the Director of Education to engage Board staff, community partners and stakeholders, and others in the development of the goals and implementation of the actions identified in the performance plan.
 - c) The degree of success the Director of Education had in achieving the goals set out in the performance plan, as informed by data available to the Board including:
 - i. Feedback collected from community partners and stakeholders, if applicable; and

- ii. Information from school climate surveys in respect of the evaluation cycle, if applicable.
 - d) The rationale provided by the Director of Education for the actions that were not implemented and the goals that were not achieved.
 - e) The effectiveness of efforts made to overcome challenges faced by the Director of Education in implementing the actions identified in the performance plan.
 - f) 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.
- 3.6.5 The Committee shall prepare a draft performance appraisal report summarizing the Committee's evaluation, setting out the performance rating and providing an explanation for the rating.

3.7 Bi-annual Feedback

- 3.7.1 In a Director of Education's first full evaluation cycle and every second full evaluation cycle after that, the Board of Trustees shall ensure that an entity that has at least five (5) years of experience conducting multi-source executive performance assessments takes the following steps:
- a) Request feedback from the following persons:
 - i. Each member of the Board of Trustees
 - 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 that 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 in accordance with 3.3.1 (c), the Minister of Education.
 - b) Prepare a written report summarizing and analyzing the feedback.
 - c) Remove any words or names that would identify a parent/guardian/caregiver or student if a request is made to do so by the parent/guardian/caregiver or student.

3.8 Record Keeping

- 3.8.1 All documents prepared or received by the Board of Trustees under Ontario Regulation 83/24, as outlined in Policy PO204 and its attendant Administrative Procedures shall be kept on file for a period of at least six (6) years from the date of the draft performance appraisal report to which the document relates.

4. Sources

- 4.1 [Education Act](#)
- 4.2 [Ontario Regulation 83/24 Director of Education Performance Appraisal](#)
- 4.3 [Ontario Regulation 224/23 Provincial Priorities in Education – Student Achievement](#)

5. Appendices

Nil

6. Related Policies and Administrative Procedures

- 6.1 Director of Education Performance Appraisal Policy (PO204)