



## SUPERIOR-GREENSTONE DISTRICT SCHOOL BOARD

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Section	ROLE DESCRIPTIONS	
Management Guideline	DIRECTOR'S PERFORMANCE APPRAISAL	
Applicable Policy	DIRECTOR'S PERFORMANCE APPRAISAL	804
Board Approved: August 26, 2024 January 22, 2019		Review By: 2029

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### ***Management Guideline***

The Director of education Performance Review Policy 804 addresses the board's commitment to providing an environment where the director of education is supported in achieving the performance expectations as he or she supports student achievement and well-being.

The Superior-Greenstone District School Board will annually conduct a growth-oriented review of the director of education's performance. The focus of the process is on the positive leadership attributes of the Director and the progress of the school board under their leadership as well as on continuous growth and improvement. The Director's Performance Review process is most effective when co-developed between the Director and Board of Trustees.

### **1.0 Policy Overview**

This guideline outlines the Superior-Greenstone District School board's approach to conducting performance appraisals of the Director of Education. The goal is to ensure the Director's performance is aligned with the board's strategic objectives, the provincial education priorities, and fosters continuous improvement and accountability in leadership and student achievement, while maintaining positive and productive relationships with the Board of Trustees.

### **2.0 Purpose**

The Director of Education Performance Review process is designed to:

- 2.1 Support high standards of leadership.
- 2.2 Ensure the Director meets Board expectations related to student achievement, well-being, and the multi-year strategic plan.
- 2.3 Enhance accountability and foster mutual growth through constructive feedback that is based upon evidence obtained through various sources, including but not limited to board reports, bi-annual feedback (e.g. 360 Assessment), attainment of goals related to the Multi-Year Strategic Plan, and the yearly Director's Performance Plan.
- 2.4 Reflect that the director is the Chief Executive Officer for the Board and, as such, is held accountable for the work performed primarily by other senior administrators – i.e. fiscal management and personnel management.

### **Rationale**



The performance appraisal process promotes the continuous development of the Director's leadership capabilities, enabling the school board to meet its educational objectives. The process should align with the Board's vision and values and the Ministry of Education's priority areas. It also fosters a transparent and proactive relationship between the Director and the Board of Trustees, ensuring public confidence in the leadership of the school system.

## **4.0 Key Definitions**

4.1 Performance Appraisal Committee (PAC): A committee responsible for conducting the performance appraisal of the Director.

4.2 Community Partners and Stakeholders: Individuals and organizations that work with the Board, including First Nations, Métis, Inuit, and local community groups.

4.3 Evaluation Cycle: The period during which the Director's performance is assessed, consisting of either a Full or Interim Evaluation Cycle.

4.3.1 Full Evaluation Cycle: an evaluation cycle that commences July 1 in a year and ends June 30 of the following year.

4.3.1 Interim Evaluation Cycle: An evaluation process for directors of education whose start date falls on or after March 1.

## **5.0 Responsibilities**

Board of Trustees: Ensures that the performance appraisal is conducted according to this policy.

Performance Appraisal Committee (PAC): Responsible for managing and implementing the appraisal process, gathering feedback, and preparing the appraisal report.

## **6.0 Scope**

This guideline applies to the establishment of the PAC, the evaluation cycles, feedback collection, performance ratings, and overall management of the appraisal process.

## **7.0 Specific Directives**

### **7.1 Establishment of the Performance Appraisal Committee (PAC)**

7.1.1 By May 15 annually, the PAC is formed, consisting of no fewer than three and no more than seven Board members.

7.1.2 The PAC will elect a Chair from among its members.

### **7.2 Timing of Evaluation Cycles**

7.2.1 Directors commencing their role before March 1, 2024, will start their first full evaluation cycle on July 1, 2024.



7.2.2 Directors starting on or after March 1, 2024, will have an interim evaluation cycle ending June 30, 2025.

### 7.3 Actions During Evaluation Cycles

7.3.1 Actions and timelines for full and interim cycles are outlined in Appendix A.

7.3.2 The performance of the director of education will not be evaluated when the director is on an extended leave that has been approved by the board (e.g. secondment to another position, illness).

### 7.4 Bi-Annual Feedback

7.4.1 During the first full evaluation cycle and every second cycle after, an external consultant will be engaged for feedback.

7.4.2 The director and PAC will determine, based upon the Director's Performance Plan and Leadership Competencies (taken from Strong Districts and Their Leaders), the areas of focus for the feedback and which questions will be asked of which stakeholders.

7.4.3 The Director and PAC will make a joint decision while selecting the external consultant and shall ensure that the external consultant has at least five years of experience conducting multi-source executive performance assessments.

7.4.4 At the direction and supervision of the board, the external consultant will:

7.4.3.1 Request feedback in respect of the director of education's performance from the following:

1. Each member of the board.
2. Each student trustee of the board.
3. Each member of every statutory, ad hoc, or other committee of the board.
4. Each staff member of the board who reports directly to the director of education.
5. Each parent member of the school council at each school of the Board.
6. A representative nominated by each local employee association representing employees of the Board.
7. A representative sample of community partners and stakeholders, as identified by the committee with input from the director of education.

*\*Feedback would be most effectively gathered from individuals whom the Director works with on a regular basis. Feedback groups should be in the position where they have enough context and understanding related to the role of director to respond to questions in a relevant manner.*

7.4.3.2 Prepare a written report summarizing and analyzing the feedback (Appendix F). All words or names that would identify a parent or student will be removed, at the parent's or student's request.



## 7.5 Performance Plan and Appraisal Template

7.5.1 A performance plan will be developed, evaluated, and updated as necessary to ensure the Director's performance aligns with the Board's goals. (Appendix D).

7.5.2 The performance plan shall include the following elements:

7.5.2.1 A list of the actions that the director of education will implement (including personal professional development) during the evaluation cycle to achieve each of the following goals:

- i. 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).
- ii. Manage human, capital and fiscal resources to achieve the goals identified in the Board's multi-year plan developed
- iii. Promote a healthy and inclusive workplace with effective systems for staff selection and oversight.
- iv. Create and maintain respectful and collaborative relationships with students, parents, staff, School Board communities, community partners and stakeholders, Ministry staff and the Minister.
- v. Demonstrate leadership that maintains or improves the reputation of and public confidence in the Board.
- vi. Ensure compliance with applicable laws, Ministry policies and guidelines, and board mandates.

7.5.2.2. Identification of leadership competencies and practices needed to achieve the director's goals and actions that the director shall implement during the evaluation cycle to improve at least one of those competencies or practices.

7.5.2.3 One or more methods of,

- i. determining whether the director of education successfully implemented the actions set out in the performance plan during the evaluation cycle, and
- ii. measuring, qualitatively or quantitatively, the degree to which the actions achieved their goals.

7.5.2.4 Any additional appraisal elements determined by the committee with input from the director of education and if the additional appraisal elements include additional goals, a list of the actions that the director of education will implement during the evaluation cycle to achieve those goals.

7.5.3 An updated performance plan, identifying the following, will be submitted to the PAC at least twenty days prior to the Performance Plan Update Meeting:

- I. A confirmation of which of the actions from the Performance Plan have been implemented by the director of education during the evaluation cycle;
- II. A description of how each action that was implemented assisted in achieving the goals of the Performance Plan; and,



- III. For each action that was not implemented by the director of education, a rationale for why the action was not implemented.

7.5.4 The PAC shall assign one of the following ratings to the performance of the director of education:

1. Meets all expectations
2. Meets most expectations
3. Meets some expectations
4. Does not meet expectations

7.5.5 When determining which performance rating to assign to the director of education, the committee shall consider the following factors:

1. The extent to which the director of education worked diligently and consistently toward the implementation of the actions identified in the performance plan.
2. 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.
3. 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. the feedback set out in the Director's Performance Plan results, if applicable, and
  - ii. the information collected by the feedback surveys, if applicable.
4. The rationale provided by the director of education for the actions that were not implemented and the goals that were not achieved.
5. The effectiveness of efforts made to overcome challenges faced by the director of education in implementing the actions identified in the performance plan.
6. 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.

7.5.6 The PAC shall prepare, for the director of education, a draft performance appraisal report summarizing the committee's evaluation, setting out the performance rating and providing an explanation for the rating. The director of education will be provided with an opportunity to respond to the report. See Appendix E: Director's Feedback

7.5.7 All Trustees are provided with the final Performance Appraisal Document, a copy of the updated Performance Plan, as well as the Director's feedback (Appendix E); each Trustee is individually asked to provide the feedback via the DPA Committee (Appendix E).

7.5.6. The Chair of the Committee reviews the feedback received from all Trustees with the DPA Committee, compiles the feedback into one document (see Appendix E) and determines a rating.

7.5.7 The PAC shares the final feedback with the Director of education.



7.5.8 The director of education and the chair of the committee shall each sign the performance plan and each of them shall retain a copy for at least six years.

7.5.9 The Chair of the Board will submit a written confirmation that the appraisal was conducted and adopted by Board resolution and outline the list of feedback groups that participated in the bi-annual feedback to the Minister.

7.5.10 The written confirmation and list of feedback groups will be posted on the Board's website.

## 8.0 Dispute Resolution Process

The dispute resolution process [outlined in the Director's Personal Service Contract] should be undertaken:

- Where there are disagreements between the Board of Trustees and the Director of education on the process followed or the written report produced; or
- If the Director of education informs the Chair of the Board that the concluding statements in the Director of education Performance Review final report do not accurately reflect his or her leadership practices and success as Director of education.

The process will include a three-member panel:

- a) One member of the panel will be selected by the Director of education in consultation with the Council of Ontario Directors of Education (CODE);
- b) The second member of the panel will be selected by the Board Chair in consultation with the Ontario Public School Boards Association (OPBSA);
- c) The third member of the panel, suitable to both CODE and OPSBA will be selected from a list of acceptable mediators.

## 9.0 Evaluation

8.1.1 This guideline will be reviewed every four years, or as necessary, to reflect changes in legislation and organizational priorities.

## 10.0 Appendices

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| 10.1.1 | Appendix A: Detailed timelines and actions for full and interim evaluation cycles, including key dates and tasks for the PAC, Board of Trustees, and external consultants involved in the appraisal process. |
| 10.1.2 | Appendix B: Notification to Ministry: Written Confirmation of Completion   |
| 10.1.3 | Appendix C: Notification to Ministry: Written Confirmation of Performance Plan   |
| 10.1.4 | Appendix D: Performance Plan and Appraisal Template  |
| 10.1.5 | Appendix E: Director and Trustee Feedback  |
| 10.1.6 | Appendix F: Bi-Annual Feedback, Observations, Next Steps   |

## 11.0 References

- Education Act Regulation 83/24



- Ontario Regulation 224/23: Provincial Priorities in Education
- Ontario Leadership Framework for System Leaders
- SGDSB Multi-Year Strategic Plan
- Policy 801 – The Role of the Director of education

## Appendix A: Detailed Timelines and Actions for Full and Interim Evaluation Cycles

**Table 1: Full Evaluation Cycle**

Yearly Timelines	Responsibility	Task
By May 16	Board of Trustees	Performance Appraisal Committee (PAC) Established ✓ PAC Chair + 3-6 members
By July 31	Board of Trustees and Director of education	PAC (Chair + 1 or more members) meet with the Director of education to develop/finalize the Director's Performance Plan.
By August 15	PAC Chair	Performance Plan shared with all members of the Board of Trustees
By August 15	Board Chair	Provide written notice to the Minister of Education (confirmation of date of hire, feedback, 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	PAC Chair	Requests feedback from Board of Trustees
By January 21	Board of Trustees	Provides feedback to the PAC Chair
By January 31	PAC Chair	PAC Chair + at least one other member of PAC meets with the Director of education to review the Director's progress towards implementing and achieving the goals of the Performance Plan.
By April 30	Board of Trustees	Board of Trustees select an entity to conduct the bi-annual feedback (e.g. 360 Assessment) <i>*Starting in the first full evaluation cycle and every second full evaluation cycle thereafter</i>
By May 15	Bi-Annual Feedback Consultant	Written report provided to the PAC and Director of education
By June 10	Director of education	Updating of Performance Plan
By June 20	PAC Chair	Provides a draft Performance Appraisal Report to Board of Trustees
By June 30	Board of Trustees	Provides feedback on the draft Performance Appraisal Report to the PAC
By July 7	PAC Chair	Provides the draft Performance Appraisal Report to Board of Trustees
By July 31	PAC Chair	PAC Chair + at least one member of PAC meets with Director of education to review the progress of Director's



		Performance Plan, update the plan, review the draft Performance Appraisal Report and provide an opportunity for the Director of education to respond.
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**Table 2: Interim Evaluation Cycle**

Interim Cycle Timelines	Responsibility	Task
30 Days after start date By September 30	PAC	PAC (Chair + 1 or more members) meet with the Director of education to develop/finalize the Director's Performance Plan.
45 Days after start date By October 15	PAC Chair	Performance Plan shared with all members of the Board of Trustees
45 Days after start date By October 15	Board Chair	Provide written notice to the Minister of Education (confirmation of date of hire, feedback, 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	PAC Chair	Requests feedback from Board of Trustees
By January 22	Board of Trustees	Provides feedback to the PAC Chair
By February 5	PAC Chair	PAC Chair + at least one other member of PAC meets with the Director of education to review the Director's progress towards implementing and achieving the goals of the Performance Plan.
By June 1	Director of education	June 10 – PAC chair and at least 1 member of PAC meets with Director of education to review the Director's progress towards implementing and achieving the goals of the Performance Plan, update the plan for the following evaluation cycle.
By June 15	PAC Chair	Provides a draft Performance Appraisal Report to Board of Trustees
By June 15	Board of Trustees	Provides feedback on the draft Performance Appraisal Report to the PAC
By June 20	PAC Chair	PAC chair and at least 1 member of PAC to meet with Director to review the draft report and provide an opportunity for response.
By June 30	PAC Chair	Provides the Performance Appraisal Report to Board of Trustees and Director and Director.
By June 30	Board Chair	Provide written confirmation of Completion of Performance Appraisal to Minister and adopted by Board resolution.





## Appendix B: Notification to Ministry of Education: Written Confirmation of Completion

*(to be placed on school board letterhead)*

The Honourable \_\_\_\_\_  
Minister of Education  
c/o 13<sup>th</sup> Floor, 315 Front St. W.  
Toronto, ON M7A 0B8  
educationequitysecretariat@ontario.ca

Date: Click or tap to enter a date.

This is to attest that \_\_\_\_\_ has completed the  
(Name of school board)  
\_\_\_\_\_ performance appraisal of their Director of education \_\_\_\_\_  
(interim or full) (Name of Director of education)  
in accordance with the Ontario Regulation XX/2024 – Director of education Performance  
Appraisal.

### Bi-annual feedback:

- No, this evaluation cycle did not require the inclusion of bi-annual community partner/stakeholder feedback.
- Yes, this evaluation cycle included the required bi-annual community partner/stakeholder feedback, and the list of community partners and stakeholders invited to provide feedback is posted on the board's website.
- Community partners and stakeholders:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date of Performance Appraisal Completion: Click or tap to enter a date.

\_\_\_\_\_  
Signature of the Chair of the Board

\_\_\_\_\_  
Printed Name of the Chair of the Board



## Appendix C: Written Notification to the Ministry of Education: Written Confirmation of Performance Plan

*(to be placed on school board letterhead)*

The Honourable \_\_\_\_\_  
Minister of Education  
c/o 13<sup>th</sup> Floor, 315 Front St. W.  
Toronto, ON M7A 0B8  
educationequitysecretariat@ontario.ca

Date: [Click or tap to enter a date.](#)

This is to confirm that \_\_\_\_\_ began their role as Director of  
Education for the \_\_\_\_\_ on \_\_\_\_\_.  
(Name of Director of education) (Name of school board)  
(Date)

### Performance Plan:

Yes, the director of education's performance plan has been put in place for the current  
\_\_\_\_\_ evaluation cycle and has been posted on our board's website.  
(interim or full)

Date of Performance Plan Completion: [Click or tap to enter a date.](#)

\_\_\_\_\_  
Signature of the Chair of the Board

\_\_\_\_\_  
Printed Name of the Chair of the Board



### Appendix D: Performance Plan and Appraisal Template

<b>Employee's Name:</b>		<b>Cycle:</b>	
		<b>Initial Meeting</b>	
<b>Position/Title:</b>		<b>Mid-Term Review Date</b>	
<b>Review Period:</b>		<b>Final Meeting Date:</b>	
<b>Committee Members:</b>			

<b>Goals (identified in Regulation 83/24)</b>	<b>Actions including professional development</b>	<b>Timelines</b>	<b>Indicators of Success Results/<b>Progress on results</b>/Results achieved  (Complete/Ongoing/At Risk)</b>
<b>(i). Advance the provincial priorities in education in the area of student achievement set out in Ontario Regulation 224/23</b>			
<b>(ii). Manage human, capital and fiscal resources to achieve goals in MYSP</b>			



**(iii). Promote a healthy and inclusive workplace with effective systems for staff selection and oversight**

**(iv). Create and maintain respectful and collaborative relationships with students, parents, staff, school board communities, community partners and stakeholders, Ministry staff and the Minister**

**(v). Demonstrate leadership that maintains or improves the reputation of and public confidence in the board**




**Ministry Requirements Section 2**

Identification of leadership competencies and practices needed to achieve the goals set out in paragraph/part 1 and actions that the director of education shall implement during the evaluation cycle to improve at least one of those competencies or practices. *N.B. The leadership competencies and practices identified here shall be described in accordance with any guideline issued by the Minister under subsection 287.6 (1) of the Act.*

<b>Competency (Strong Districts and Their Leadership)</b>	<b>Actions to further develop/improve competency</b>

**Ministry Requirements Section 4**

Any additional appraisal elements determined by the committee with input from the director of education and if the additional appraisal elements include additional goals, a list of the actions that the director of education will implement during the evaluation cycle to achieve those goals.

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**Committee's Comments / Feedback**

Committee Chair provides draft performance appraisal report to the director of education. Committee Chair and at least one other member of the committee reviews the report with the director and provides the director opportunity to respond. The committee finalizes the report, with feedback from the board and the director, as well as from the survey, and provides the final appraisal report to the board and the director. The director and the chair of the committee shall each sign the performance plan and each shall retain a copy for at least six years.

**Summary of Areas of Strength/Celebration**

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**Summary of Areas of Growth and Next Steps**

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## Summary Comments

## Rating and Signatures

### Overall Rating Please check:

- Meets all expectations
- Meets most expectations
- Meets some expectations
- Does not meet expectations

\_\_\_\_\_  
Committee Chair's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Director's Signature

\_\_\_\_\_  
Date



## Appendix E: Director and Trustee’s Feedback

### Director’s Feedback:

The Director asked to complete their personal assessment about the appraisal process and appraisal results based on the following:

Director’s Feedback on the Appraisal Results and Process	
Areas of Strength/Celebration	Areas for Growth and Next Steps
Comments	

### Trustees’ Feedback:

All Trustees are provided with the final Performance Appraisal Document, a copy of the updated Performance Plan, as well as the Director’s feedback (area of strength, growth, comments-template above); each Trustee is individually asked to provide the feedback via the DPA Committee.

Sample Template for collecting Individual Trustee Feedback on Appraisal Results and Process	
Areas of Strength/Celebration	Areas for Growth and Next Steps
Comments	

## Appendix F: Bi-Annual Feedback, Observations, Next Steps

To be completed by external consultant to summarize and share stakeholder feedback. To be shared with the director of education, when applicable.

### Feedback:

Observations

Strengths



Areas of growth and next steps

Summary Comments

**Signature of External Consultant:**

**Date:**