

1. Rationale:

The purpose of this performance appraisal plan is to develop and maintain acceptable levels of performance with non-teaching staff. The plan strives to support and encourage staff and foster excellence in the workplace. Personal growth is to be sustained; employee effectiveness and individual worth are to be acknowledged.

Furthermore, the plan will provide the means to constructively assist an employee in improving performance standards where and when necessary.

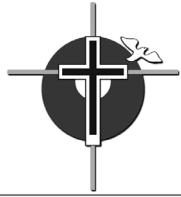
Performance appraisal is an evaluation process based on established criteria and performance standards. Existing job descriptions, or as modified thereafter, are the fundamental parameters in determining performance levels. The process is predicated on mutual trust and respect, and achieved in a professional manner, resulting in increased accountability, performance effectiveness and individual growth.

2. Performance Appraisal Procedure:

- i. Performance appraisals will be carried out by the immediate supervisor according to the following schedule:
 - a) Permanent employees (defined as no longer probationary): **at least once every five (5) years**
 - b) Probationary employees (defined as newly hired employees, or current employees assigned to a different job classification): **at least once during the probationary period**, as specified by the appropriate collective agreement, conditions of employment or Board policy.

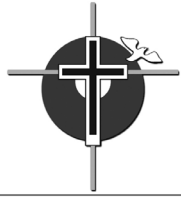
The Human Resources Department, in consultation with the appropriate Supervisory Officer, will maintain an annual record of evaluations.

- ii. Performance appraisals will be carried out according to the following procedure:
 - a) At the beginning of the period in which the evaluation will take place, the employee and immediate supervisor will meet to review and discuss the performance appraisal procedure. They will also review the existing job description obtained from the Human Resources Department and examine the duties of the job. They



will jointly set objectives for the period of evaluation using *Appendix A – Summary of Objectives for the Evaluation Period*.

- b) During this meeting, the employee will be provided with:
- a copy of the *Performance Appraisal Administrative Procedure*;
 - a blank copy of the *Performance Appraisal – Non-Teaching Staff* form;
 - a copy of the job description;
 - a copy of the objectives jointly set for the evaluation period.
- c) During the period of evaluation, the immediate supervisor will evaluate the employee's performance level based on the criteria defined in the *Performance Appraisal Administrative Procedure*, on the parameters established in the existing job description and on the objectives jointly set for the evaluation period. At the end of the evaluation period, the immediate supervisor will complete the *Performance Appraisal – Non-Teaching Staff* form.
- d) The employee and immediate supervisor will meet to discuss the performance appraisal. The employee will be advised of the date and time of this meeting at least five (5) working days prior to the meeting date.
- e) The employee will sign the *Performance Appraisal – Non-Teaching Staff* form as evidence of having read it and discussed it with the immediate supervisor. The employee will have an opportunity to provide comments on the form.
- f) The *Performance Appraisal – Non-Teaching Staff* form will be prepared in triplicate: one copy for the employee, one copy for the immediate supervisor and the original to be sent to Human Resources (in a sealed envelope marked 'confidential' for the employee's official file.)
- g) Employees with unsatisfactory performance appraisals, that is, evaluated at level "Needs Improvement" in one or more areas of performance, will be reevaluated under the process entitled *Employees with Unsatisfactory Performance Appraisal*.
- h) Notwithstanding the schedule set out in 2 i) above, any employee may request a performance appraisal by the immediate supervisor. The principal / supervisor may refuse to conduct a requested performance appraisal if he or she is of the opinion that it is unlikely that the performance appraisal will lead to improvement in the employee's performance.

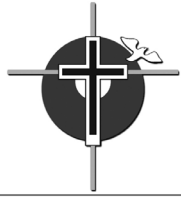


- i) Nothing in this procedure prevents the employer from conducting additional appraisals, if the school principal/supervisor sees fit. While this procedure indicates a minimum number of appraisals, these requirements are not intended to interfere with the principal's/supervisor's discretionary right to observe an employee's practice, meet with employees to discuss performance, request samples of employee's work, provide feedback an employee, or to support an employee's growth and development at any time.
- j) Nothing in this procedure prevents the employer from suspending or terminating an individual, in the event that an employee has, in the opinion of the employer, committed an act deemed serious enough as to warrant immediate suspension or termination.

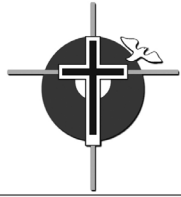
3. Employees With an Unsatisfactory Performance Appraisal:

If an employee is evaluated at a level indicating "Needs Improvement" in one or more areas of performance, the following steps will occur:

- i. The immediate supervisor will provide the employee a clear written statement of specific areas of unsatisfactory performance, based on the "Performance Appraisal – Non-Teaching Staff" form.
- ii. The immediate supervisor and the employee will meet to discuss the specific areas of unsatisfactory performance. In consultation with the employee, the immediate supervisor will develop a formal *Plan for Improvement (Appendix B)* based on acceptable levels of performance. The *Plan for Improvement* will provide sufficient detail, including any training requirements and identify a specific time frame for improving unsatisfactory performance. Appropriate resources for improving performance will be recommended as part of the plan. The employee will receive a copy of the *Plan for Improvement* and a copy will be forwarded to the appropriate supervisory officer. At the employee's request, a union representative (if applicable) may be present.
- iii. The employee will undertake to implement the 'Plan for Improvement' within the specified time frame. During this period, the supervisor will meet with the employee on a regular basis to monitor progress. Written comments on these meetings will be recorded and a copy given to the employee and to the appropriate supervisory officer.



- iv. At the end of the time frame specified in the *Plan for Improvement*, the supervisor will conduct a performance appraisal and complete the *Performance Appraisal – Non-Teaching Staff* form. The employee and immediate supervisor will meet to discuss the performance appraisal. The employee will be advised of the date and time of this meeting at least five (5) working days prior to the meeting date.
- v. The employee will sign the *Performance Appraisal – Non-Teaching Staff* form as evidence of having read it and discussed it with the immediate supervisor. The employee will have an opportunity to provide comments on the form.
- vi. The *Performance Appraisal – Non-Teaching Staff* form will be prepared in triplicate: one copy for the employee, one copy for the immediate supervisor and the original to be sent to Human Resources via the appropriate supervisory officer (in a sealed envelope marked 'confidential' for the employee's official file.)
- vii. If the *Plan for Improvement* was successfully implemented and the employee's performance is rated as *Satisfactory*, no further action is needed.
- viii. If the employee's performance is still rated at *Needs Improvement*, the following steps will occur:
 - a) **Probationary Employees** – The supervisory officer may recommend to the Board termination of employment or a third evaluation.
 - b) **Permanent Employees** – A third evaluation. The Board may transfer the employee to another assignment, to provide new opportunities for satisfactory performance. A transfer also allows sufficient time to implement another *Plan for Improvement*.
- ix. Third Evaluation:
 - a) The supervisor will request a meeting with the employee, the appropriate supervisory officer, and a union representative (if applicable), to review and discuss all written documentation resulting from the appraisal procedure. The formal *Plan for Improvement* will be reviewed and, in consultation with the employee, amended as required. A specified time frame for improving unsatisfactory performance will be specified. The employee will receive a copy of the *Plan for Improvement* and a copy will be given to the appropriate supervisory officer.



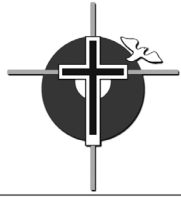
- b) At the end of the time frame specified in the *Plan for Improvement*, the immediate supervisor* will conduct a performance appraisal and complete the *Performance Appraisal – Non-Teaching Staff* form.

* The third evaluation may be completed by an individual other than the immediate supervisor including, but not limited to: a Program Principal, the Department Manager, or a Supervisory Officer.

- c) The employee, immediate supervisor, appropriate supervisory officer and union representative (if applicable) will meet to discuss the performance appraisal. The employee will be advised of the date and time of this meeting at least five (5) working days prior to the meeting date.
- d) The employee will sign the *Performance Appraisal – Non-Teaching Staff* form as evidence of having read it and discussed it with the immediate supervisor and appropriate supervisory officer. The employee will have an opportunity to provide comments on the form.
- e) The *Performance Appraisal – Non-Teaching Staff* form will be prepared in triplicate: one copy for the employee, one copy for the immediate supervisor and the original to be sent to Human Resources via the appropriate supervisory officer (in a sealed envelope marked 'confidential' for the employee's official file.)
- f) If the *Plan for Improvement* was successfully implemented and the employee's performance is rated above *Needs Improvement*, no further action is needed.
- g) If the employee's performance is still rated at *Needs Improvement*, the Superintendent of Human resources will recommend the termination of employment to the Board of Trustees.

4. Performance Criteria and Scale

- i. **Criteria** - Criteria come under eleven distinctive headings:
- knowledge
 - organization
 - cooperation
 - communication
 - interpersonal skills
 - initiative
 - quality of work



- judgment
 - attendance
 - supervisory ability (if applicable)
 - achievement of objectives
- ii. **Scale** - Each criterion is evaluated based on a two-level scale:
- a) Satisfactory (S) – performance consistently meets the requirements and standards;
 - b) Needs Improvement (NI) - performance does not meet the requirements and standards
- iii. The immediate supervisor must provide a comment in each area of evaluation, where applicable.
- iv. Employees evaluated a level NI in one or more area of performance are experiencing difficulty and will require further support and assistance. These employees are subject to further appraisals; if unsatisfactory performance persists, a recommendation to terminate employment may ensue. (Refer to section entitled *Employees with Unsatisfactory Performance Appraisal*.)

5. Custodial Staff – Facility Green Cleaning Inspection

- i. In addition to these performance appraisal procedures, the Supervisor of Plant Operations will meet at least once per year with each custodian and conduct an inspection of the site. These inspections will focus on cleanliness and maintenance of the site.
- ii. The Supervisor of Plan Operations will inspect the custodian’s area of responsibility and complete the *Facility Green Cleaning Inspection* (Appendix C).
- iii. Following this inspection, the Supervisor of Plant Operations will meet with the custodian to discuss the *Facility Green Cleaning Inspection*. The Supervisor of Plant Operations will identify any deficiencies in the custodian’s cleaning regimen.
- iv. In the event that the Supervisor of Plant Operations deems the custodian’s cleaning practices to be below standard, the custodian will commence the Performance Appraisal of Non-Teaching Staff process, regardless of how recently they may have been appraised (as per 2. ii. (a) above).



**CATHOLIC DISTRICT SCHOOL BOARD OF EASTERN ONTARIO
PERFORMANCE APPRAISAL - NON-TEACHING STAFF**

Employee's Name: _____ Position: _____

Location: _____ Date: _____

Status: _____ probationary _____ permanent

This report must be completed by the employee's immediate supervisor according to the procedure set out in the *Performance Appraisal of Non-Teaching Staff Administrative Procedure*. The immediate supervisor must comment in each area of evaluation. Custodians and Plant and Maintenance staff may be evaluated by the Plant Operations Supervisor.

Levels of performance:

(S) Satisfactory
(NI) Needs Improvement

1. Knowledge – Demonstrates knowledge of specific job requirements and knowledge of appropriate methods, practices, and procedures.

Satisfactory _____ Needs Improvement _____

Comments

2. Organization - Sets priorities, plans and executes duties and responsibilities in a logical and systematic manner. Employee uses time and resources effectively to achieve goals.

Satisfactory _____ Needs Improvement _____

Comments

3. Cooperation – Is willing to work with others toward a common objective and works as a team member. Employee has a positive and flexible approach to demands.

Satisfactory _____ Needs Improvement _____

Comments

4. Communication - Uses language effectively in oral expression and in written work (as required).
Employee communicates in a courteous and professional manner.

Satisfactory _____

Needs Improvement _____

Comments

5. Interpersonal skills - Deals effectively with others, in a variety of situations, showing sensitivity, tact, diplomacy, and respect.

Satisfactory _____

Needs Improvement _____

Comments

6. Initiative - Takes action and resolves problems within the limits of the job duties and responsibilities. Identifies needs, develops action plans, and responds accordingly.

Satisfactory _____

Needs Improvement _____

Comments

7. Quality of work - Executes duties and responsibilities effectively and with a high degree of accuracy.

Satisfactory _____

Needs Improvement _____

Comments

8. Judgement - Makes consistent, pertinent and logical decisions.

Satisfactory _____

Needs Improvement _____

Comments

9. Attendance - Attends work regularly and respects work schedule.

Satisfactory _____

Needs Improvement _____

Comments

10. Supervisory ability *(rate only if employee exercises supervision on a regular basis)*

Provides direction, support and coaching to employees, as required, for accomplishing objectives and achieving goals.

Satisfactory _____

Needs Improvement _____

Comments

11. Achievement of objectives - Achieves objectives jointly set by the employee and immediate supervisor for the evaluation period.

Satisfactory _____

Needs Improvement _____

Comments

ADDITIONAL COMMENTS:

EMPLOYEE'S COMMENTS:

My signature indicates the receipt of this performance appraisal.

Employee

Date

Immediate Supervisor

Date

Supervisory Officer

Date

FOR HUMAN RESOURCES DEPARTMENT USE

Review date entered: _____ Entered by: _____

ORIGINAL: Human Resources

COPY 1: Employee

COPY 2: Immediate Supervisor

