

Procedure Title	Performance Appraisal: Educational Support Professionals (SECURE)		
Date of Issue	June 6, 2018	Related Policy	BP 7150-D
Revision Dates		Related Forms	AF 7130; AF 7132; AF 7135; AF 7136; AF 7137
Review Date		Originator	Administrative Council
References			

1.0 RATIONALE

- 1.1 Bluewater District School Board is committed to providing fair, effective, consistent and comprehensive feedback on the employee's work performance.
- 1.2 Through dialogue with their supervisor, employees will be provided with:
 - a) an opportunity to reflect on their accomplishments;
 - b) a comprehensive evaluation of their work performance; and
 - c) a forum for reviewing goals and objectives, identifying job expectations and establishing goals and recommendations for growth for the upcoming year.
- 1.3 Performance appraisals provide an opportunity for identifying discussion areas for improved performance and any support that an employee may require, as well as training and development needs.
- 1.4 The Educational Support Professionals (ESP) employee group includes Educational Assistants (EAs), Early Childhood Educators (ECEs), and Outdoor Education Specialists (OESs).

2.0 GENERAL

- 2.1 Performance appraisals for ESP will be conducted on a five-year evaluation cycle.
- 2.2 An interim review may be conducted at any time during the five-year evaluation cycle, as determined by the supervisor.
- 2.3 If concerns arise, they should be addressed immediately, as opposed to waiting until the performance appraisal meeting.
- 2.4 Educational Support Professionals who are new to the board will receive a performance appraisal once during the six-month probation period.
- 2.5 If an ESP is on an extended leave during all or part of a year that is scheduled as an evaluation year, any performance appraisal that would otherwise be carried out during that period will be initiated, commencing with the pre-appraisal meeting, within 60 business days following return from leave.

3.0 ANNUAL LEARNING PLAN

- 3.1 The ESP will develop and submit an annual learning plan (ALP) using AF 7130 "Annual Learning Plan", outlining goals, in addition to training and development needed for the upcoming year. In an appraisal year, the supervisor and the employee will engage in a performance discussion prior to October 31.

- 3.2 The AF 7130 “Annual Learning Plan” will be submitted each year to the immediate supervisor, and review of AF 7130 will be part of the performance appraisal process at both the pre-appraisal, and at the performance appraisal meetings.
- 3.3 If necessary, during a non-appraisal year, a meeting will be arranged by the supervisor to discuss the ESP’s ALP.

4.0 PERFORMANCE APPRAISAL PROCEDURE

- 4.1 Each supervisor will notify the ESP (who is in their evaluation year) within 20 working days of the start of the school year or date of hire.

4.2 PRE - APPRAISAL MEETING

- i) Each supervisor should set-up a pre-appraisal meeting for the ESP, in their evaluation year, to review and familiarize them with the performance appraisal process, ensure the expectations of the performance appraisal are clearly understood and to discuss any procedural issues and aspects of professionalism.
- ii) This meeting will occur a minimum of 24 hours prior to the commencement of the appraisal period. The performance appraisal evaluation period will be from September through June. The performance appraisal will be completed by June 30 of the appraisal year.

4.3 DATA COLLECTION

- i) The supervisor shall review any evidence that they have collected during the performance appraisal evaluation period which demonstrates the employee’s work performance. Evidence for each performance appraisal may include, but is not limited to, information obtained from: reviewing information concerning job requirements; reviewing the job description and the core competencies for the employee’s position; viewing and scripting of performance; reviewing materials such as records, plans, resources; discussion of professional learning activities.
- ii) The principal/supervisor will discuss the ALP consistent with collective agreement article 13.

4.4 PERFORMANCE APPRAISAL MEETING

- i) At the conclusion of the performance appraisal evaluation period, the supervisor will review the data collected and arrange the performance appraisal meeting as soon as possible, but no longer than 20 days after the appraisal period (15 school days if unsatisfactory).
- ii) The employee shall come to the performance appraisal meeting with a summary of accomplishments and progress on goals and training from the previous year’s AF 7130 “Annual Learning Plan”.
- iii) Goals for the upcoming appraisal year will be discussed the year prior to the performance appraisal meeting.
- iv) The purpose of the performance appraisal meeting is to:
- Discuss the employee’s general work performance over the past year, progress on established goals, as well as any specific areas that require improvement;
 - Discuss implications of the supervisor’s review, including performance rating;
 - Provide evidence that documents the evaluation of each core competency and goal;
 - Review and finalize the ALP.

4.5 PERFORMANCE APPRAISAL FINAL REPORT AND RATING

- i) The ESP’s final performance appraisal report will be documented using either AF 7135 “Early Childhood Educator - Performance Appraisal Final Report”, AF 7136 “Educational Assistant -

Performance Appraisal Final Report”, or AF 7137 “Outdoor Education Specialist – Performance Appraisal Final Report”, and will contain the following:

- a. An evaluation of the employee (accompanied by explanation(s) for each core competency, as well as an overall rating, according to the following rating scale:

- M** Meets Expectations (employee completes job assignments as expected)
- DNM** Does Not Meet Expectations (Employee is not meeting expected performance standards and needs to make significant improvement in job performance)
- DN** Development Needed (Employee needs to make some specific improvements in job performance)
- N/A** Not Applicable (If a particular factor is not applicable to the employee being evaluated, a notation of N/A may be inserted)

- ii) AF 7135 / AF 7136 / AF 7137 will be signed and dated by the supervisor who conducted the performance appraisal meeting, and a copy will be provided to the ESP at the conclusion of the performance appraisal meeting.
- iii) The ESP will be given an opportunity to review the evaluation and provide written comments within five (5) working days after the completed/signed AF 7135 / AF 7136 / AF 7137 is presented to them. The ESP will sign and date the form indicating that they have received a copy of it.
- iv) A copy of the final AF 7135 / AF 7136 / AF 7137 and AF 7130 will be distributed to the ESP, the immediate supervisor, and the executive officer human resources services (for placement in the personnel file).

5.0 DOES NOT MEET EXPECTATIONS RATING

- 5.1 In instances where an appraisal results in a Does Not Meet Expectations rating AF 7135 / AF 7136 / AF 7137 “Performance Appraisal Final Report”, the following additional procedures will be adhered to:
 - i) If the ESP receives a “Does Not Meet Expectations” rating(s), the supervisor, seeking input from the employee, will complete AF 7132 “Performance Appraisal Improvement Plan” outlining how the employee will improve performance, including specific goals, any required training and development, and time frames for completion.
 - ii) If the supervisor is recommending an overall rating of Does Not Meet Expectations, the supervisor will complete AF 7132 “Performance Appraisal Improvement Plan” and designate an appropriate time frame for re-evaluation. In this situation, the performance appraisal must be discussed with the appropriate superintendent, and must be sent to executive officer human resources services for review prior to being presented to the ESP.
 - iii) The ESP will be provided with the opportunity to have union representation.