



Catholic Director of Education Performance Appraisal

2022 05 31 / 2024 10 29

Related Policies and Resources

Although all policies and procedures of the St. Clair Catholic District School Board are overseen by the Director of Education, the following are particularly relevant to this policy.

- Board Code of Conduct
- Trustee Code of Conduct
- Board of Trustees Role

Administrative Procedures

The St. Clair CDSB adheres to the strategic priorities as set out in the Board's *Strategic Plan 2022-2026*, and the Vision, Mission, Priorities and Values of the Board. The successful performance of the Director of Education is critical to ensuring organizational success and provides demonstrated evidence of progress towards the achievement of Board goals and priorities. The Board recognizes that success for the system is achieved through collaboration, consultation, and cooperation between the Board of Trustees and the Director of Education and that the success of the Director of Education Performance Appraisal (DPA) process is dependent upon good faith, clear communication, and adherence to shared Catholic system values. The DPA policy and procedure will support student success and foster ethical Catholic leadership and confidence in Catholic education by ensuring that regular and cyclical performance appraisals of the Director of Education are completed.

While feedback is an ongoing process, the DPA is conducted annually in alignment with O. Reg. 83/24. It is an opportunity each year to clarify expectations, set goals and priorities, and engage in constructive and strategic dialogue.

The Board of Trustees: Accountability, Transparency and Confidentiality

The Board will ensure that an accountable, transparent and effective Director of Education Performance Review process will:

- (a) identify a clear rationale and objectives for the process;
- (b) clearly outline a process and timelines;
- (c) identify mutually agreed upon assessment criteria and goals that are measurable, based on the Multi-Year Strategic Plan, the Director's Annual Report, legislative requirements and Board policy;
- (d) collect objective evidence to support assessment criteria and goals;
- (e) outline overall performance based on agreed upon assessment criteria and goals;
- (f) identify a process for addressing situations where performance is unsatisfactory;
- (g) include a written report for approval by the Board of Trustees; and
- (h) comply with all expectations set forth in O. Reg. 83/24.

The Board will maintain and respect confidentiality throughout the DPA process by ensuring that:

- a) the DPA is confidential and will be conducted in private. In accordance with the Education Act, Section 207(2)(b), *Closing of certain committee meetings*, which states the disclosure of intimate, personal, or financial information in respect of a member of the Board or committee, an employee or prospective employee of the board or a pupil or his or her parents or guardians, specific details and materials related to the performance review will remain confidential; and
- b) discussion shall be limited to the process and the identification of goals and performance indicators.

1. Responsibilities

Trustees shall:

- (a) be aware of their individual and collective responsibilities as the Board of Trustees related to the DPA process;
- (b) participate in and complete the DPA process, when required;
- (c) maintain confidentiality;
- (d) review the DPA policy in accordance with the priorities in the Multi-Year Strategic Plan and the approved policy review cycle;
- (e) develop and implement the DPA and provide constructive feedback with a focus on effective strategies and leadership practices that demonstrate progress on agreed upon goals and performance indicators; and
- (f) approve any revisions to the DPA procedure.

The Director of Education is responsible for:

- (a) actively participating in the performance review process;
- (b) collaborating with the Chair and Vice Chair of the Board and DPA committee to determine the goals and performance indicators that are aligned with the Director's Annual Growth Plan, the Multi-Year Strategic Plan, and any other mutually determined goals;
- (c) allocating staff and resources to support the implementation of the DPA;
- (d) knowing their responsibilities and the individual and collective responsibilities of trustees related to the DPA;
- (e) discussing the evaluation process and developing a work plan with the Chair of the Board;
- (f) working with the Chair of the DPA committee to achieve consensus on final goals;
- (g) completing the appropriate tools identified in this procedure;



- (h) reflecting on shared learning and implementing goals, priorities, and areas of improvement; and
- (i) maintaining confidentiality.

Dispute Resolution

If the Director of Education, Chair and Vice Chair of the Board do not agree on the final evaluation, the following process will be followed.

A three-member panel composed of the following individuals will be established:

- (a) one member will be selected by the Director of Education in consultation with the English Council of Catholic Directors of Education (ECCODE) and CODE;
- (b) a second member will be selected by the Chair or Vice Chair in consultation with the Ontario Catholic School Boards Association (OCSTA); and
- (c) a third member will be an external consultant, with expertise in mediation, agreed upon by ECCODE and OCSTA.

This three-member panel will consider all information presented by the Chair or Vice Chair of the Board, the Director of Education, and the external consultant and make recommendation(s) to the Board for consideration. The external consultant will facilitate this process.

2. Timelines

Starting in the 2023-2024 school year, the Board must complete the annual DPA in accordance with O. Reg. 83/24. In addition to the assessment criteria set out in regulation, the Board may include additional locally focused appraisal criteria determined by the Board in collaboration with the Director of Education.

An incoming Director of Education will undergo their first DPA based on their start date in accordance with the following schedule:

Start date of the Director of Education	Start date of first full evaluation cycle
On or after July 1 in a year and on or before the last day of February in the following year	The first July 1 following their start date
On or after March 1 in a year and on or before June 30 in that same year	The July 1 in the following calendar year

A Director of Education whose start date falls on or after March 1 will complete their first DPA according to the Interim Evaluation Cycle section below. After the Director of Education's first evaluation cycle, the DPA will be conducted annually by the dates identified in O. Reg. 83/24 as is outlined in the Full Evaluation Cycle section below.



Interim Evaluation Cycle

Step 1: Appoint DPA Committee

On or before May 15, the Board will establish a committee of no fewer than three and not more than seven Board members to conduct the DPA. One member shall be elected by a majority of the committee to act as Chair of the DPA committee.

Step 2: Develop Performance Plan

Within 30 days of the Director of Education's start date, the Chair and at least one other member of the DPA committee will meet with the Director of Education to develop and finalize their performance plan in accordance with s. 9(1)-9(3) of O. Reg. 83/24.

Step 3: Notice of Performance Plan

Within 45 days of the Director of Education's start date, the Chair of the DPA committee will provide a copy of the Director of Education's performance plan to every member of the Board.

The Chair of the DPA committee will also provide written notice to the Minister which includes:

- (a) the date that the Director of Education began their role; and
- (b) confirmation that the Director of Education's performance plan has been put in place for the current evaluation cycle.

In addition, the Chair of the DPA committee must post a copy of the confirmation to the Board's website.

Step 4: Mid-year Review

At least 20 days before the Chair and at least one other member of the DPA committee are due to meet with the Director of Education to discuss progress on the performance plan, the Chair of the DPA committee will request feedback from every member of the Board on the Director of Education's progress towards implementing and achieving the goals in the performance plan.

At least 10 days before the Chair and at least one other member of the DPA committee are due to meet with the Director of Education to discuss progress on the performance plan, each member of the Board will have the opportunity to provide feedback to the Chair of the DPA committee.

On or before the closest weekday to a date that is midway between the date that notice is provided to the Minister and the final day of the interim evaluation period, the Chair and at least one other member of the DPA committee shall meet with the Director of Education to review progress towards implementing and achieving goals in the performance plan.

Step 5: Draft DPA Report



On or before June 10, the Director of Education shall update the performance plan in accordance with s. 9(4) of O. Reg. 83/24.

On or before June 20, the Chair of the DPA committee will provide a copy of the draft DPA report, prepared in accordance with s. 10 of O. Reg. 83/24 to every member of the Board.

On or before June 30, each member of the Board will give any feedback they might have in response to the request for feedback.

Step 6: Review DPA Report

On or before July 7, the Chair of the DPA committee will provide the draft DPA report to the Director of Education.

On or before July 31, the Chair and at least one other member of the DPA committee will meet the Director of Education to review actions to achieve a performance plan, update the performance plan for the following evaluation cycle, discuss the draft of the DPA report, and provide opportunity for response.

Step 7: Final DPA Report

On or before August 10, the DPA committee will finalize the DPA report and provide the final report to the Director of Education.

On or before August 15, the Board will provide written confirmation to the Minister that the DPA has been conducted and adopted by Board resolution. On that same date, the Board will post a copy of the written confirmation to the Board's website.

Full Evaluation Cycle

Step 1: Appoint DPA Committee

On or before May 15, the Board will establish a committee of no fewer than three and not more than seven board members to conduct the DPA. One member shall be elected by a majority of the committee to act as Chair of the DPA committee.

Step 2: Develop Performance Plan

On or before July 31, the Chair and at least one other member of the DPA committee will meet with the Director of Education to develop and finalize their performance plan in accordance with s. 9(1)-9(3) of O. Reg. 83/24.

Step 3: Notice of Performance Plan

On or before August 15, the Chair of the DPA committee will provide a copy of the Director of Education's performance plan to every member of the Board.

On or before August 15, the Chair of the DPA committee will also provide written notice to the



Minister of Education which includes:

- (a) the date that the Director of Education began their role;
- (b) confirmation as to whether bi-annual feedback (as stated in s. 8(1) of O. Reg. 83/24) is required during the current evaluation cycle; and
- (c) confirmation that the Director of Education's performance plan has been put in place for the current evaluation cycle.

In addition, the Chair of the DPA committee must post a copy of the confirmation to the Board's website.

Step 4: Mid-year review

In a full evaluation cycle in which bi-annual feedback is required, by December 1 the Minister will provide written notice to the Board and the Director of Education on whether the Minister intends to provide feedback under s. 8.

On or before January 11, the Chair of the DPA committee shall request feedback from every member of the Board on the Director of Education's progress toward implementing and achieving the goals in the performance plan.

On or before January 21, each member of the Board will provide feedback to the Chair of the DPA committee.

On or before January 31, the Chair of the DPA committee and at least one other committee member shall meet with the Director of Education to review progress towards implementing and achieving goals in the performance plan.

Step 5: Bi-annual feedback

The Board shall procure an entity to conduct the bi-annual feedback that has at least five years of experience conducting multi-source executive performance assessments.

On or before April 30, starting in the first full evaluation cycle and every second full cycle year thereafter, the entity selected to conduct the bi-annual feedback will request feedback from the following individuals (as listed in s. 8(2) of O. Reg. 83/24 in respect to the Director of Education's performance):

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 DPA committee with input from the Director of Education.

8. If the Minister has provided notice to the Board and Director of Education of their intention to provide feedback, the Minister is to be involved in providing feedback.

Step 6: Draft DPA report

On or before May 15, the entity selected to conduct the bi-annual feedback will prepare a written report that summarizes and analyzes feedback and will submit the report to the DPA committee and the Director of Education.

On or before June 10, the Director of Education shall update their performance plan in accordance with s. 9(4) of O. Reg. 83/24.

On or before June 20, the Chair of the DPA committee will provide a copy of the draft DPA report, prepared in accordance with s. 10 of O. Reg. 83/24, to every member of the Board.

On or before June 30, each member of the Board will provide any feedback on the draft DPA report to the DPA committee.

Step 7: Review draft DPA report

On or before July 7, the Chair of the DPA committee will provide the draft DPA report to the Director of Education.

On or before July 31, the Chair and at least one other member of the DPA committee will meet with the Director of Education to review actions implemented to achieve goals in the performance plan, update the plan for the following evaluation cycle, discuss the draft of the report, and provide opportunity for response.

Step 8: Final DPA report

On or before August 10, the DPA committee will finalize the DPA report and provide the final report to the Board and the Director of Education.

On or before August 15, the Board shall provide the following items to the Minister:

- (a) written confirmation that the DPA has been conducted and adopted by Board resolution;
and
- (b) a list of community partners and stakeholders that participated in the bi-annual feedback.

On that same date, the Board shall post a copy of both above listed items to the Board's website.

3. Performance Appraisals and Ratings

Based on the results of the DPA, the DPA committee shall assign one of the following performance ratings to the Director of Education:

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

When determining which performance rating to assign to the Director of Education for the Board, the DPA 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 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 report required by executive performance consulting firm if applicable, and
 - ii. the information collected by the school climate surveys required by subsection 169.1 (2.1) of the Act in respect of the evaluation cycle, 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 the goals that were not achieved.

The DPA committee shall summarize their evaluation in the draft DPA report, setting out the performance rating and providing an explanation for the rating.

4. Additional Information

The St. Clair Catholic District School Board is committed to the principles of equity and inclusive education, consistent with our Catholic teachings, which value and promote human rights and social justice in all Board policies, programs, guidelines, operations and practices.

List of Appendices

- Appendix A** – Director of Education Performance Appraisal: Full Evaluation Cycle – Technical Guide
- Appendix B** – Director of Education Performance Appraisal: Interim Evaluation Cycle – Technical Guide
- Appendix C** – Catholic Director of Education Appraisal Report
- Appendix D** – Catholic Director of Education Appraisal Report Instruction Guide
- Appendix E** – Sample Template - Director of Education Performance Appraisal Written Confirmation of Performance Plan
- Appendix F** – Sample Template – Director of Education Performance Appraisal Written Confirmation of Completion

Appendix A

Director of Education Performance Appraisal

Full Evaluation Cycle - Technical Guide

Starting in the 2023-24 school year, all school boards must complete their annual director of education performance appraisals in accordance with O. Reg. 83/24. In addition to the assessment criteria set out in regulation, boards may include additional locally-focused appraisal criteria determined by the board in collaboration with the Director of Education.

This document is intended as a guide. For a complete list of requirements, refer to Ontario Regulation (O. Reg.) 83/24 - Director of Education Performance Appraisal.

Start date of director of education	Start date of first full evaluation cycle
Before March 1, 2024	July 1, 2024
On or before March 1, 2024, and on or before June 30, 2024	July 1, 2025
On or after July 1 in a year and on or before the last day of February in the following year	The first July 1 following their start date
On or after March 1 in a year and on or before June 30 in that same year	July 1 in the following calendar year



After a director of education's first evaluation cycle, performance appraisals will be conducted annually, by the dates identified in steps 1 – 8 of the full evaluation cycle.

1 Appoint DPA Committee

By **May 15**: the board of trustees is required to establish a committee of no fewer than three and not more than seven board members to conduct a performance appraisal of the director of education. One member shall be elected by a majority of the committee to act as its chair.

2 Develop Performance Plan

By **July 31**: the committee chair and at least one other member of the committee is required to meet with the director of education to develop and finalize their performance plan in accordance with s. 9(1)-9(3) of O. Reg. 83/24.

3 Notice of Performance Plan

By **August 15**: the committee chair is required to provide a copy of the director of education's performance plan to every member of the board.

By **August 15**: the chair of the board is required to provide written notice to the Minister which includes the following information:

- Date that the director of education began their role
- Confirmation as to whether a bi-annual feedback (as stated in s. 8(1) of O. Reg. 83/24) is required during the current evaluation cycle
- Confirmation that the director of education's performance plan has been put in place for the current evaluation cycle

In addition, the Chair must post a copy of the confirmation on the board's website.

4 Mid-year review

By **December 1**: In a full-evaluation cycle in which a bi-annual feedback is required, the Minister is required to provide written notice to the board of trustees and the director of education on whether the Minister intends to provide feedback under s. 8.

By **January 11**: the committee chair will request feedback from every member of the board on the director of education's progress towards implementing and achieving the goals in the performance plan.

By **January 21**: each member of the board will have to provide feedback to the chair of the committee.

By **January 31**: the committee chair and at least one other member of the committee shall meet with the director of education to review progress towards implementing and achieving goals in the performance plan.

5 Bi-annual feedback

By **April 30**, starting in the first full evaluation cycle and every second full cycle year thereafter: the entity* selected to conduct the bi-annual feedback is required to request feedback from the following individuals (as listed in s. 8(2) of O. Reg. 83/24 in respect to the director of education's performance).

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
8. If the Minister has provided notice to the board and director of their intention to provide feedback, the minister is to be involved in providing feedback.

* The board shall procure an entity that has at least five years of experience conducting multi-source executive performance assessments.



6 Draft performance appraisal report

By **May 15**: the entity is required to prepare a written report that summarizes and analyzes feedback and submit the report to the committee and the director of education.

By **June 10**: the director of education shall update their performance plan in accordance with s. 9(4) of O. Reg. 83/24.

By **June 20**: the committee chair will be required to provide a copy of the draft performance appraisal report, prepared in accordance with s. 10 of O. Reg. 83/24, to every member of the board.

By **June 30**: each member of the board will be required to provide any feedback on the draft performance appraisal report to the committee.

7 Review draft performance appraisal report

By **July 7**: the committee chair will provide the draft performance appraisal report to the director of education.

By **July 31**: the committee chair and at least one member of the committee will meet the director of education to review actions implemented to achieve goals in the performance plan, update the plan for the following evaluation cycle, discuss the draft of the report, and provide opportunity for response.

8 Final performance appraisal report

By **August 10**: the committee to finalize the performance appraisal report and provide the final report to the board and the director of education.

By **August 15**: the board to provide:

- Written confirmation to the Minister that the performance appraisal has been conducted and adopted by board resolution.
- A list of community partners and stakeholders that participated in the bi-annual feedback to the Minister.

On that same date, the board to post a copy of the written confirmation and the list of community partners and stakeholders on the board's website.

Appendix B



Director of Education Performance Appraisal

Interim Evaluation Cycle - Technical Guide

Starting in the 2023-24 school year, all school boards must complete their annual director of education performance appraisals in accordance with O. Reg. 83/24. In addition to the assessment criteria set out in regulation, boards may include additional locally-focused appraisal criteria determined by the board in collaboration with the Director of Education.

This document is intended as a guide. For a complete list of requirements, refer to Ontario Regulation (O. Reg.) 83/24 - Director of Education Performance Appraisal.

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On or after July 1 in a year and on or before the last day of February in the following year	The first July 1 following their start date
On or after March 1 in a year and on or before June 30 in that same year	July 1 in the following calendar year



Directors of education whose start dates fall on or after March 1 are required to complete the interim evaluation cycle. After a director of education's first evaluation cycle, performance appraisals will be conducted annually, by the dates identified in O. Reg. 83/24 or summarized in steps 1 – 8 of the full evaluation cycle (refer to full evaluation cycle overview/technical guide).

1 Appoint DPA Committee

By no later than **May 15**: the board of trustees is required to establish a committee of no fewer than three and not more than seven board members to conduct a performance appraisal of the director of education. One member shall be elected by a majority of the committee to act as its chair.

2 Develop Performance Plan

Within 30 days of a director of education's first day in the role: the committee chair and at least one other member of the committee are required to meet with the director of education to develop and finalize their performance plan in accordance with s. 9(1)-9(3) of O. Reg. 83/24.

3 Notice of Performance Plan

Within 45 days of a director of education's first day in the role, the committee chair is required to provide a copy of the director of education's performance plan to every member of the board. Additionally, the chair of the board is required to provide written notice to the Minister which includes the following information:

- Date that the director of education began their role
- Confirmation that the director of education's performance plan has been put in place for the current evaluation cycle.

In addition, the Chair must post a copy of the confirmation on the board's website.

4 Mid-year review

At least 20 days before the committee chair and at least one other member of the committee are due to meet with the director of education to discuss progress on the performance plan, the committee chair will request feedback from every member of the board on the director of education's progress towards implementing and achieving the goals in the performance plan.

At least 10 days before the committee chair and at least one other member of the committee are due to meet with the director of education to discuss progress on the performance plan, each member of the board will have the opportunity to provide feedback to the chair of the committee.

By the closest **weekday to a date that is midway between the date that notice is provided to the Minister and final day of the interim evaluation period**, the committee chair and at least one other member of the committee shall meet with the director of education to review progress towards implementing and achieving goals in the performance plan.

5 Draft performance appraisal report

By June 10: the director of education shall update the performance plan in accordance with s. 9(4) of O. Reg. 83/24.

By June 20: the committee chair will be required to provide a copy of the draft performance appraisal report, prepared in accordance with s. 10 of O. Reg. 83/24 to every member of the board.

By June 30: each member of the board is required to give any feedback they might have in response to the request for feedback.

6 Review draft performance appraisal report

By July 7: the committee chair will provide the draft performance appraisal report to the director of education.

By July 31: the committee chair and at least one member of the committee will meet the director of education to review actions to achieve a performance plan, update the performance plan for the following evaluation cycle, discuss the draft of the report, and provide opportunity for response.

7 Final performance appraisal report

By August 10: the committee to finalize the performance appraisal report and provide the final report to the board and the director of education.

By August 15: the board to provide:

- Written confirmation to the Minister that the performance appraisal has been conducted and adopted by board resolution.

On that same date, the board to post a copy of the written confirmation on the board's website.

Appendix C

Catholic Director of Education Appraisal Report

Director:		School Board:			
Chair of the Board:		Mid Appraisal Date:		Final Appraisal Date:	
Committee Chair:		Appraisal Cycle:	<input type="checkbox"/> Interim <input type="checkbox"/> Full	Community Feedback:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Appraisal Committee:					

Ministry Priorities	Resources
<p>For the purposes of subsection 11.2 (1) of the Act, the following are the provincial priorities in education in the area of student achievement:</p> <ol style="list-style-type: none"> 1. Achievement of learning outcomes in core academic skills. 2. Preparation of students for future success. 3. Student engagement and well-being. 	<ul style="list-style-type: none"> • Pastoral Letters for Catholic Education (e.g., This Moment of Promise, Fulfilling the Promise, Renewing the Promise) • The Congregation for Catholic Education • Education Act and Related Regulations • Good Governance: A Guide for Trustees, School Boards, Directors of Education, and Communities • Ontario Leadership Framework: Catholic System-Level Leadership • PPM 159: Collaborative Professionalism • Ontario's Education Equity Action Plan • Ontario First Nation, Metis and Inuit Education Policy Framework

PART 1: Performance Plan

Goals for Catholic District School Boards

The director shall identify from each of the goals listed below actions to be implemented.

Placing Christ and the teachings of the Catholic Church at the centre:

1. Promote Catholic Identity by nurturing Catholic community, culture and Christian service in the Board.
2. Advance the provincial priorities in Catholic education in the area of student achievement set out in [Ontario Regulation 224/23 \(Provincial Priorities in Education - Student Achievement\)](#).
3. Manage human, capital and fiscal resources to achieve the goals identified in the Catholic board's multi-year plan developed under [clause 169.1 \(1\) \(f\) of the Act](#).
4. Promote a healthy and inclusive workplace with effective systems for staff selection and oversight, promoting the dignity of the human person.
5. Create and maintain respectful and collaborative relationships with students, parents, staff, Catholic school board communities, community partners and stakeholders, Ministry staff and the Minister.
6. Demonstrate Catholic leadership that maintains or improves the reputation of and public confidence in the board.
7. Ensure compliance with applicable laws, Ministry policies and guidelines, and Catholic board mandates.

Goal 1: Promote Catholic identity by nurturing Catholic community, culture and Christian service in the Board

Select the action(s) to be implemented to achieve this goal:

Placing Christ and the teachings of the Catholic Church at the centre:

- Nurture communities of faith in schools and offices throughout the board.
- Ensure that a transparent visioning/direction-setting process reflecting the mandate of the Catholic school system is carried out.
- Ensure the Board Multi-Year Plan (MYP), approved by the Board of Trustees, reflects our Catholic faith and includes concrete actions to the attainment of Catholic expectations listed in the MYP.
- Ensure collaborative relationships are nurtured at the schools with the local bishop, diocesan staff and clergy and provide opportunities to mutually share priorities and goals.
- Demonstrate a commitment to high standards for the integration of Catholic content and context in all curriculum and documents developed for the board.
- Embed the vision of the learner, as expressed in the Ontario Catholic School Graduate Expectations, MYP, board improvement plan, and other director-initiated interactions.
- Develop, implement, and monitor an ongoing plan for the approved Religious Education program used in elementary and secondary schools throughout the board.
- Develop, implement, and monitor an ongoing plan for the Institute for Catholic Education (ICE) Family Life program throughout the board.
- Provide ongoing adult faith formation opportunities for trustees, board staff and the broader Catholic community to witness the Good News to the communities they serve.
- Build Catholic identity, faith and knowledge of the teachings and traditions of the Catholic Church by participation in workshops, seminars, online courses, retreats and conferences.
- Demonstrate the qualities of faith-inspired leadership in serving the board and larger community.
- Use data from all available sources, including the Catholic Tradition, to assist decision making throughout the school board.
- Report to the Board of Trustees on progress in building, nurturing and promoting Catholic community, culture and Christian service.
- Other actions.

Action	Indicators of Progress	Results / Outcomes
Specify approaches and strategies that will assist you in achieving your goal	Identify supporting materials or other observable evidence. How will you know if the strategies were successful?	To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)

Goal 2: Advance the provincial priorities in Catholic education in the area of student achievement set out in Ontario Regulation 224/23 (Provincial Priorities in Education - Student Achievement)

Select the action(s) to be implemented to achieve this goal:

Placing Christ and the teachings of the Catholic Church at the centre:

- Align curricular goals, assessment instruments, instructional practices and teaching resources.
- Advance the wellbeing, engagement, and achievement of each student, with respect to equity and human rights considerations.
- Insist on ambitious goals for teaching and learning.
- Expect schools to recognize the dignity of all human persons reviewing, and where possible, preventing and removing system and structural barriers in their focus on the needs of individuals as well as groups of students.
- Encourage staff to be innovative within the boundaries created by the district's instructional guidance system (e.g., align with MYP/SAP/BIEP/MAAP).
- Identify disparities and improve Indigenous student wellbeing, engagement, and achievement.

- Develop and implement board and school improvement plans (e.g., SAP/MAAP) interactively and collaboratively with school leaders.
- Build system’s capacity and disposition for using systematically collected data to inform as many decisions as possible.
- Provide training for principals and staff on the use of data and research literature to sustain decision making.
- Require improvement processes to be research based and evidence informed.
- Align the content of professional learning with the capacities needed for district and school improvement.
- Hold staff accountable for applying new capacities by monitoring the implementation of school improvement plans.
- Provide extensive professional learning opportunities for both teachers and school-level leaders, most of it through some form of learning community or on-the-job context.
- Report to the Board of Trustees progress in advancing the provincial priorities in education in the area of student achievement.
- Other actions.

Action Specify approaches and strategies that will assist you in achieving your goal	Indicators of Progress Identify supporting materials or other observable evidence. How will you know if the strategies were successful?	Results / Outcomes To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)

Goal 3: Manage human, capital and fiscal resources to achieve the goals identified in the Catholic board’s multi-year plan developed under clause 169.1 (1) (f) of the Act

Select the action(s) to be implemented to achieve this goal:

Placing Christ and the teachings of the Catholic Church at the centre:

- Align organizational structures with the district’s improvement goals.
- Align personnel policies and procedures with the district’s improvement goals.
- Align the allocation of resources with district and school improvement goals.
- Build system’s capacity and disposition for using systematically collected data to inform as many decisions as possible.
- Create structures to facilitate regular monitoring and refining of improvement processes.
- Develop and implement board and school improvement plans interactively and collaboratively with school leaders.
- Require improvement processes to be research based and evidence informed.
- Align the content of professional learning with the capacities needed for district and school improvement.
- Require individual staff growth plans to be aligned with district and school improvement priorities.
- Expect and assist schools to allocate instructional resources equitably.
- Provide training for principals and staff on the use of data and research literature to sustain decision making.
- Encourage trustees to focus on district policy and the achievement of the district’s goals and priorities (policy governance model of trustee practice).
- Report to the Board of Trustees progress in managing human, capital and fiscal resources to achieve the goals identified in the board’s MYP.
- Other actions.

Action Specify approaches and strategies that will assist you in achieving your goal	Indicators of Progress Identify supporting materials or other observable evidence. How will you know if the strategies were successful?	Results / Outcomes To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)

Goal 4: Promote a healthy and inclusive workplace with effective systems for staff selection and oversight, promoting the dignity of the human person

Select the action(s) to be implemented to achieve this goal:

Placing Christ and the teachings of the Catholic Church at the centre:

- Demonstrate the virtues and values of faith-inspired leadership when serving the board in staff selection and oversight.
- Establish formal structures to promote the dignity of the human person and human rights.
- Enhance diversity in the recruitment, hiring and promotion of educators and school and system leaders.
- Strengthen accountability for equity and human rights in performance appraisals (e.g., supervisory officers).
- Develop realistic plans for leadership succession.
- Match the capacities of leaders with the needs of schools.
- Provide prospective and existing leaders with extended opportunities to further develop their personal faith and Catholic leadership capacities.
- Build system's capacity and disposition for using systematically collected data to inform as many decisions as possible.
- Require improvement processes to be research based and evidence informed.
- Create structures to facilitate regular monitoring and refining of improvement processes.
- Use the best available evidence about successful leadership (e.g., Ontario Catholic Leadership Framework) as a key source of criteria used for recruiting, selecting, developing and appraising school and district leaders.
- Establish ongoing equity, inclusion and human rights training for staff, and school and system leaders.
- Provide training for principals and staff on the use of data and research literature to sustain decision-making.
- Establish formal structures to increase knowledge and awareness of Indigenous histories, knowledges, perspectives and contributions.**
- Report to the Board of Trustees progress in promoting a healthy and inclusive workplace, with effective systems for staff selection and oversight, promoting the dignity of the human person.**
- Other actions.

Action Specify approaches and strategies that will assist you in achieving your goal	Indicators of Progress Identify supporting materials or other observable evidence. How will you know if the strategies were successful?	Results / Outcomes To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)

Goal 5: Create and maintain respectful and collaborative relationships with students, parents, staff, Catholic school board communities, community partners and stakeholders, Ministry staff and the Minister

Select the action(s) to be implemented to achieve this goal:

Placing Christ and the teachings of the Catholic Church at the centre:

- Promote strong relationships with the local Bishop on decisions affecting the Catholic school board.
- Consult extensively with the Catholic community (e.g., students, parents, staff, clergy, stakeholders) about district directions as part of the MYP process.
- Develop and implement board and school improvement plans (e.g., SAP/MAAP) interactively and collaboratively with school leaders.
- Create structures and norms within the district to encourage regular, reciprocal and extended deliberations about improvement progress within and across schools, as well as across the system.
- Encourage participation of the elected board in setting broad goals for its use in fulfilling its policy-setting and policy-monitoring responsibilities within the mandate of the Catholic school system.
- Hold schools accountable for developing productive working relationships with parents.

- Create structures to facilitate reciprocal forms of communication between leaders working together to achieve the system’s directions.
- Promote high levels of interaction among school leaders, driven by a shared sense of responsibility for system improvement.
- Collaborate with partners in Catholic education on alignment and coherence to support the direction of the board (e.g., SEAC, Indigenous Education Councils).
- Assist schools to develop and sustain effective working relationships with parish priests and parish communities.
- Encourage schools to champion positive home-school-parish relationships.
- Routinely consult with community groups on decisions affecting the diverse school community.
- Develop/maintain high levels of engagement with the Ministry of Education.
- Engage frequently with the ministry proactively, rather than only responsively.
- Report to the Board of Trustees progress in creating and maintaining respectful and collaborative relationships with students, parents, staff, school board community, community partners and stakeholders, ministry staff and the Minister.
- Other actions.

Action Specify approaches and strategies that will assist you in achieving your goal	Indicators of Progress Identify supporting materials or other observable evidence. How will you know if the strategies were successful?	Results / Outcomes To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)

Goal 6: Demonstrate Catholic leadership that maintains or improves the reputation of and public confidence in the board
Select the action(s) to be implemented to achieve this goal:

- Placing Christ and the teachings of the Catholic Church at the centre:*
- Ensure that the mission, vision and goals of the system are widely known, understood and shared by all members of the organization.
 - Build system’s capacity and disposition for using systematically collected data to inform as many decisions as possible.
 - Articulate, demonstrate and model the system’s goals, priorities, and gospel values to staffs when visiting schools.
 - Demonstrate the importance the district attaches to its Catholic partners and community connections (e.g., Advisory Councils).
 - Insist on the use of the best available research and other systematically collected evidence to inform decisions wherever possible.
 - Use data from all available sources including the Catholic Tradition to assist decision making throughout the school board.
 - Provide training for principals and staff on the use of data and research literature to sustain decision making.
 - Model evidence informed decision making to school staffs.
 - Require improvement processes to be research based and evidence informed.
 - Encourage trustees to focus on district policy and the achievement of the district’s goals and priorities (policy governance model of trustee practice).
 - Encourage reciprocal forms of communication with and among schools.
 - Develop communication systems and processes throughout the district to keep all members informed.
 - Report to the Board of Trustees, progress in demonstrating leadership that maintains or improves the reputation of and public confidence in the board.
 - Other actions.

Action Specify approaches and strategies that will assist you in achieving your goal	Indicators of Progress Identify supporting materials or other observable evidence. How will you know if the strategies were successful?	Results / Outcomes To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)

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Goal 7: Ensure compliance with applicable laws, Ministry policies and guidelines, and Catholic board mandates
 Select the action(s) to be implemented to achieve this goal:

Placing Christ and the teachings of the Catholic Church at the centre:

- Nurture and promote Catholic identity, faith and knowledge of the teachings and traditions of the Catholic Church, in accordance with the directives of the Assembly of Catholic Bishops of Ontario.
- Adhere to and support the Institute for Catholic Education’s mandate to promote Catholic education animated by the Gospel and reflecting the tenets of the Catholic faith (e.g., Ontario Catholic School Graduate Expectations, Religion Curriculum, Family Life Curriculum).
- Establish formal structures to promote the dignity of the human person and human rights.
- Hold staff accountable for applying new capacities by monitoring the implementation of school improvement plans (e.g., MYP/SAP/MAAP).
- Acknowledge and implement provincial goals and priorities in schools and the district (e.g., PPMs).
- Become familiar and ensure ongoing compliance with legislation affecting education (e.g., *Child and Family Services Act*, *Safe Schools Act*).
- Encourage trustees to focus on district policy and the achievement of the district’s goals and priorities (policy governance model of trustee practice).
- Develop and maintain high levels of engagement with the Ministry of Education.
- Encourage participation of the elected board in setting broad goals for its use in fulfilling its policy-setting and policy-monitoring responsibilities within the mandate of the Catholic school system.
- Adhere to and implement mandated Board Action Plans (e.g., Special Education Plan, Equity Action Plan, Board Action Plan for Indigenous Education).
- Report to the Board of Trustees and Ministry of Education progress in ensuring compliance with applicable laws, Ministry policies and guidelines, and board mandates.
- Other actions.

Action Specify approaches and strategies that will assist you in achieving your goal	Indicators of Progress Identify supporting materials or other observable evidence. How will you know if the strategies were successful?	Results / Outcomes To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)

Key Development and Faith Formation Activities to Achieve Performance Goals

Identify key development and faith formation activities you will undertake to enhance your Catholic leadership competencies and practices to deliver on your performance goals for student achievement and well-being (e.g., retreats, system committees, Ministry of Education seminars/webinars, community partnerships, provincial or regional leadership roles, church and community engagement).

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Key Professional Learning and Faith Formation Activities

Identify key professional learning and faith formation activities (e.g., retreats, Catholic professional reading, professional and parish committees, courses, conferences, professional networks, collaborations) you will undertake to enhance your Catholic leadership competencies and practices as a Catholic Director of Education.

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PART 2: Mid-Cycle Appraisal Review

Appraiser’s Comments and Reflections for Next Cycle

The appraiser(s) will comment on the director’s performance based on the results achieved (i.e., Part 1) and how the results were achieved.

Comments

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Next Steps

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Mid-Cycle Meeting Attendees’ Name(s)

Date

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Director’s Comments and Reflections for Next Cycle

The Director of Education is provided the opportunity to respond to the committee’s evaluation and offer next steps in the cycle.

Comments (Optional)

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Next Steps and Actions to be Taken (Optional)

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PART 3: Final Performance Appraisal Report

Appraiser's Comments and Reflections for Next Cycle

The appraiser(s) will comment on the director's performance based on the results achieved (i.e., Part 1) and how the results were achieved (see O. Reg. 83/24).

Comments

Next Steps and Actions to be Taken

Overall Rating

When determining which performance rating to assign to the director of education for the board, 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 report required by executive performance consulting firm if applicable, and ii.) the information collected by the school climate surveys required by subsection 169.1 (2.1) of the Act in respect of the evaluation cycle, if applicable (Note: Full-cycle evaluation only).
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.

Overall Rating - Please check:

- Meets All Expectations
- Meets Most Expectations
- Meets Some Expectations
- Does Not Meet Expectations

Director's Comments and Reflections

The Director of Education is provided the opportunity to respond to the committee's evaluation, performance rating, and explanation for the rating.

Comments (Optional)

Next Steps and Actions to be Taken (Optional)

Chair of the Committee's Name (Printed):

Director's Name (Printed):



Chair of the Committee's Signature:	Director's Signature (Indicating Receipt of Appraisal Report):
Date:	Date:

Note: The Director of Education Performance Appraisal Report must be retained for a period of at least six years from the date of the draft report.

Confidentiality Notice: This document and any enclosures are strictly private and confidential.

Appendix D

Catholic Director of Education

Appraisal Report Instruction Guide

This Catholic Director of Education Appraisal Report Instruction Guide has been developed in response to the requirements set out in Ontario Regulation [83/24: Director of Education Performance Appraisal](#). The OCSTA has prepared two different formats of the appraisal report, the interactive report and the non-interactive report, which school boards are invited to use.

The Interactive Report (.docm file)

This report is interactive and allows the user to click check boxes to show/hide actions that can be completed in the form. There are certain conditions that must be met in order to use the interactive report:

- 1) You must use the latest version of Microsoft Word.
- 2) You must download the file (you cannot use O365 or Word Online to complete) and use the Word application to edit it.
- 3) You must accept multimedia content and/or macros once you open the file.

Steps to complete:

- 1) Once you open the report, complete the introductory information table (seen below).

Director:		School Board:	
Chair of the Board:		Mid Appraisal Date:	Final Appraisal Date:
Committee Chair:		Appraisal Cycle:	<input type="checkbox"/> Interim <input type="checkbox"/> Full
Appraisal Committee:		Community Feedback:	<input type="checkbox"/> Yes <input type="checkbox"/> No

- 2) Review the seven Goals for Catholic District School Boards (seen below).

PART 1: Performance Plan

Please see Ontario Regulation [83/24: Director of Education Performance Appraisal](#) for the requirements of completing this section.

Goals for Catholic District School Boards
<p>The director shall identify from each of the goals listed below actions to be implemented.</p>
<p><i>Placing Christ and the teachings of the Catholic Church at the centre:</i></p> <ol style="list-style-type: none"> 1. Promote Catholic Identity by nurturing Catholic community, culture and Christian service in the Board. 2. Advance the provincial priorities in Catholic education in the area of student achievement set out in Ontario Regulation 224/23 (Provincial Priorities in Education - Student Achievement). 3. Manage human, capital and fiscal resources to achieve the goals identified in the Catholic board’s multi-year plan developed under clause 169.1 (1) (f) of the Act. 4. Promote a healthy and inclusive workplace with effective systems for staff selection and oversight, promoting the dignity of the human person. 5. Create and maintain respectful and collaborative relationships with students, parents, staff, Catholic school board communities, community partners and stakeholders, Ministry staff and the Minister. 6. Demonstrate Catholic leadership that maintains or improves the reputation of and public confidence in the board. 7. Ensure compliance with applicable laws, Ministry policies and guidelines, and Catholic board mandates.

- 3) For each Goal, click the check box to expand the table to see all the sample actions for the goal.

Goal 1: Promote Catholic identity by nurturing Catholic community, culture and Christian service in the board

Select the action(s) to be implemented to achieve this goal: (click to view/hide the list of actions)

You will then see a list of check boxes of all the actions for the goal appear under the goal heading (see below).

Goal 1: Promote Catholic identity by nurturing Catholic community, culture and Christian service in the board

Select the action(s) to be implemented to achieve this goal: (click to view/hide the list of actions)

Placing Christ and the teachings of the Catholic Church at the centre:

- Build Nurture communities of faith in schools and offices throughout the board.
- Ensure that a transparent visioning/direction-setting process reflecting the mandate of the Catholic school system is carried out.
- Ensure the Board Multi-Year Plan (MYP), approved by the Board of Trustees, reflects our Catholic faith and includes concrete actions to the attainment of Catholic expectations listed in the MYP.
- Ensure collaborative relationships are nurtured at the schools with the local bishop, diocesan staff and clergy and provide opportunities to mutually share priorities and goals.
- Demonstrate a commitment to high standards for the integration of Catholic content and context in all curriculum and documents developed for the board.
- Embed the vision of the learner, as expressed in the Ontario Catholic School Graduate Expectations, MYP, board improvement plan, and other director-initiated interactions.
- Develop, implement, and monitor an ongoing plan for the approved Religious Education program used in elementary and secondary schools throughout the board.
- Develop, implement, and monitor an ongoing plan for the Institute for Catholic Education (ICE) Family Life program throughout the board.
- Provide ongoing adult faith formation opportunities for trustees, board staff and the broader Catholic community to witness the Good News to the communities they serve.
- Build Catholic identity, faith and knowledge of the teachings and traditions of the Catholic Church by participation in workshops, seminars, online courses, retreats and conferences.
- Demonstrate the qualities of faith-inspired leadership in serving the board and larger community.
- Use data from all available sources, including the Catholic Tradition, to assist decision-making throughout the school board.
- Report to the Board of Trustees on progress in building, nurturing and promoting Catholic community, culture and Christian service.
- Other actions.

When you click one of the sample action check boxes, a table will appear beneath the list of sample actions. This table can be completed by filling out the "Indicators of Progress" and "Results/Outcomes" columns (see image below):

Encourage reciprocal forms of communication with and among schools.
 Develop communication systems and processes throughout the district to keep all members informed.
 Regularly report to the Board of Trustees, progress in demonstrating leadership that maintains or improves the reputation of and public confidence in the board.
 Other actions.

Action	Indicators of Progress	Results / Outcomes
Specify approaches and strategies that will assist you in achieving your goal	(Identify supporting materials or other observable evidence. How will you know if the strategies were successful?)	To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)
Develop communication systems and processes throughout the district to keep all members informed		
Specify approaches and strategies that will assist you in achieving your goal	(Identify supporting materials or other observable evidence. How will you know if the strategies were successful?)	To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)
Regularly report to the Board of Trustees, progress in demonstrating leadership that maintains or improves the reputation of and public confidence in the board		

Sample actions can be edited as needed to reflect the local context once you click the box to show the action table.
 Please add board specific strategies using bulleted points below the action text.
 Be sure to complete the actions tables for all seven goals.

- 4) Complete the “Key Development Activities to Achieve Performance Goals” and the “Key Professional Learning Activities” sections.

Key Development and Faith Formation Activities to Achieve Performance Goals

Identify key development and faith formation activities you will undertake to enhance your Catholic leadership competencies and practices to deliver on your performance goals for student achievement and well-being (e.g., retreats, system committees, Ministry of Education seminars/webinars, community partnerships, provincial or regional leadership roles, church and community engagement).

Key Professional Learning and Faith Formation Activities

Identify key professional learning and faith formation activities (e.g., retreats, Catholic professional reading, professional and parish committees, courses, conferences, professional networks, collaborations) you will undertake to enhance your Catholic leadership competencies and practices as a Catholic Director of Education.

- 5) Prior to the Mid-Cycle Appraisal Review, add to any of the above action tables any pertinent information (“Indicators of Progress” and “Results/Outcomes”). Then, complete PART 2: Mid-Cycle Appraisal Review (see below):



PART 2: Mid-Cycle Appraisal Review

Please see Ontario Regulation [83/24: Director of Education Performance Appraisal](#) for the requirements of completing this section.

Appraiser's Comments and Reflections for Next Cycle	
The appraiser(s) will comment on the director's performance based on the results achieved (i.e., Part 1) and how the results were achieved.	
Comments	
Next Steps	
Mid-Cycle Meeting Attendees' Name(s)	Date
Director's Comments and Reflections for Next Cycle	
The Director of Education is provided the opportunity to respond to the committee's evaluation and offer next steps in the cycle.	
Comments (Optional)	
Next Steps and Actions to be Taken (Optional)	

- 6) Prior to the Final Performance Appraisal Report, add to any of the above action tables any pertinent information ("Indicators of Progress" and "Results/Outcomes"). Then, complete PART 3: Final Performance Appraisal Report. Be sure to include/check the overall rating (see below):

PART 3: Final Performance Appraisal Report

Please see Ontario Regulation [83/24: Director of Education Performance Appraisal](#) for the requirements of completing this section.

Appraiser's Comments and Reflections for Next Cycle	
The appraiser(s) will comment on the director's performance based on the results achieved (i.e., Part 1) and how the results were achieved (see O. Reg. 83/24).	
Comments	
Next Steps and Actions to be Taken	
Overall Rating When determining which performance rating to assign to the director of education for the board, the committee shall consider the following factors:	Overall Rating - Please check: <input type="checkbox"/> Meets All Expectations

<ol style="list-style-type: none"> 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 report required by executive performance consulting firm if applicable, and ii.) the information collected by the school climate surveys required by subsection 169.1 (2.1) of the Act in respect of the evaluation cycle, if applicable (Note: Full-cycle evaluation only). 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. 	<input type="checkbox"/> Meets Most Expectations <input type="checkbox"/> Meets Some Expectations <input type="checkbox"/> Does Not Meet Expectations
Director's Comments and Reflections	
The Director of Education is provided the opportunity to respond to the committee's evaluation, performance rating, and explanation for the rating.	
Comments (Optional)	
Next Steps and Actions to be Taken (Optional)	

7) Sign and date the document (see below):

Chair of the Committee's Name (Printed):	Director's Name (Printed):
Chair of the Committee's Signature:	Director's Signature (Indicating Receipt of Appraisal Report):
Date:	Date:

Note: The Director of Education Performance Appraisal Report must be retained for a period of at least six years from the date of the draft report.

Confidentiality Notice: This document and any enclosures are strictly private and confidential.

8) Save your file as a .docx file in order to be able to email the file.

The Non-Interactive Report (.docx file)

This report contains blank tables that can be filled out (and edited to add rows) right in the form. You can add rows to any table by highlighting a row, right clicking and choosing to insert a row. More detailed instructions on adding rows if available further on in these instructions.

Steps to complete:

1. Once you open the report, complete the introductory information table (seen below).

Director:		School Board:			
Chair of the Board:		Mid Appraisal Date:		Final Appraisal Date:	
Committee Chair:		Appraisal Cycle:	<input type="checkbox"/> Interim <input type="checkbox"/> Full	Community Feedback:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Appraisal Committee:					

2. Complete Review the seven Goals for Catholic District School Boards (seen below).

PART 1: Performance Plan

Please see Ontario Regulation [83/24: Director of Education Performance Appraisal](#) for the requirements of completing this section.

Goals for Catholic District School Boards
The director shall identify from each of the goals listed below actions to be implemented.
<i>Placing Christ and the teachings of the Catholic Church at the centre:</i>
<ol style="list-style-type: none"> 1. Promote Catholic Identity by nurturing Catholic community, culture and Christian service in the Board. 2. Advance the provincial priorities in Catholic education in the area of student achievement set out in Ontario Regulation 224/23 (Provincial Priorities in Education - Student Achievement). 3. Manage human, capital and fiscal resources to achieve the goals identified in the Catholic board's multi-year plan developed under clause 169.1 (1) (f) of the Act. 4. Promote a healthy and inclusive workplace with effective systems for staff selection and oversight, promoting the dignity of the human person. 5. Create and maintain respectful and collaborative relationships with students, parents, staff, Catholic school board communities, community partners and stakeholders, Ministry staff and the Minister. 6. Demonstrate Catholic leadership that maintains or improves the reputation of and public confidence in the board. 7. Ensure compliance with applicable laws, Ministry policies and guidelines, and Catholic board mandates.

3. For each Goal, copy and paste the sample actions provided into the table below. Sample actions can be edited as needed to reflect the local context. Please add board specific strategies using bulleted points below the action text. To distinguish each action, you can create a new row in the table (instructions further down).

Goal 1: Promote Catholic identity by nurturing Catholic community, culture and Christian service in the board
Select the action(s) to be implemented to achieve this goal and copy each one into the table below. You can insert a new row for each action. Then complete the "Indicators of Progress" and the "Results/Outcomes" columns for each row in the table.
<i>Placing Christ and the teachings of the Catholic Church at the centre:</i>
<ul style="list-style-type: none"> • Nurture communities of faith in schools and offices throughout the board. • Ensure that a transparent visioning/direction-setting process reflecting the mandate of the Catholic school system is carried out. Ensure the Board Multi-Year Plan (MYP), approved by the Board of Trustees, reflects our Catholic faith and includes concrete actions to the attainment of Catholic expectations listed in the MYP. • Ensure collaborative relationships are nurtured at the schools with the local bishop, diocesan staff and clergy and provide opportunities to mutually share priorities and goals.



- Demonstrate a commitment to high standards for the integration of Catholic content and context in all curriculum and documents developed for the board.
- Embed the vision of the learner, as expressed in the Ontario Catholic School Graduate Expectations, MYP, board improvement plan, and other director-initiated interactions.
- Develop, implement, and monitor an ongoing plan for the approved Religious Education program used in elementary and secondary schools throughout the board.
- Develop, implement, and monitor an ongoing plan for the Institute for Catholic Education (ICE) Family Life program throughout the board.
- Provide ongoing adult faith formation opportunities for trustees, board staff and the broader Catholic community to witness the Good News to the communities they serve.
- Build Catholic identity, faith and knowledge of the teachings and traditions of the Catholic Church by participation in workshops, seminars, online courses, retreats and conferences.
Highlight one action. Then copy (CTRL+C; or CMD+C, or right click and choose copy)
- Demonstrate the qualities of faith-inspired leadership in serving the board and larger community.
- Use data from all available sources, including the Catholic Tradition, to assist decision-making throughout the school board.
- Demonstrate Report to the Board of Trustees on progress in building, nurturing and promoting Catholic community, culture and Christian service.
- Other actions.

Action Specify approaches and strategies that will assist you in achieving your goal	Indicators of Progress Identify supporting materials or other observable evidence. How will you know if the strategies were successful?	Results / Outcomes To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)
Build Catholic identity, faith and knowledge of the teachings and traditions of the Catholic Church by participation in workshops, seminars, online courses, retreats and conferences. <i>Paste the copied action here. Use CTRL+V; CMD+V; or Right Click and Choose Paste</i>	<i>Complete this section for the action to the left</i>	<i>Complete this section for the action to the left</i>

To insert a new row in Microsoft Word:

Action Specify approaches and strategies that will assist you in achieving your goal	Indicators of Progress Identify supporting materials or other observable evidence. How will you know if the strategies were successful?	Results / Outcomes To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)
<p>Build Catholic identity, faith and knowledge of the teachings and traditions of the Catholic Church by participation in workshops, seminars, online courses, retreats and conferences</p> <p>Paste the copied action here. Use CTRL+V; CMD+V; or Right Click and Choose Paste</p>	<p>Complete this section for the action to the left</p>	<p>Complete this section for the action to the left</p> <p>Highlight the entire column by left clicking on your mouse and holding and dragging to the end of the column on the right side of the screen</p> <p>You will see a gray highlight At the end of the column</p>

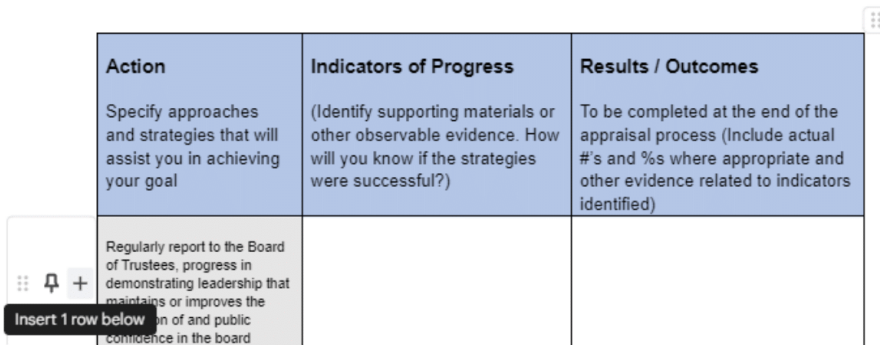
Right click your mouse and choose "Insert" → Then choose "Insert Rows Below". You will see an empty row appear below your table:

Action Specify approaches and strategies that will assist you in achieving your goal	Indicators of Progress Identify supporting materials or other observable evidence. How will you know if the strategies were successful?	Results / Outcomes To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)
<p>Build Catholic identity, faith and knowledge of the teachings and traditions of the Catholic Church by participation in workshops, seminars, online courses, retreats and conferences</p>		


New Row

To insert a new row in Google Docs:

Hover over the table, wait for a + sign to appear on the left side of the table, click the + to insert a row below.



Action	Indicators of Progress	Results / Outcomes
Specify approaches and strategies that will assist you in achieving your goal	(Identify supporting materials or other observable evidence. How will you know if the strategies were successful?)	To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)
Regularly report to the Board of Trustees, progress in demonstrating leadership that maintains or improves the reputation of and public confidence in the board		

Action	Indicators of Progress	Results / Outcomes
Specify approaches and strategies that will assist you in achieving your goal	(Identify supporting materials or other observable evidence. How will you know if the strategies were successful?)	To be completed at the end of the appraisal process (Include actual #'s and %s where appropriate and other evidence related to indicators identified)
Regularly report to the Board of Trustees, progress in demonstrating leadership that maintains or improves the reputation of and public confidence in the board		
		

Sample actions can be edited as needed to reflect the local context. Be sure to complete the actions tables for all seven goals. Please add board specific strategies using bulleted points below the action text.



4. Complete the “Key Development Activities to Achieve Performance Goals” and the “Key Professional Learning Activities” sections.

<p align="center">Key Development and Faith Formation Activities to Achieve Performance Goals</p> <p>Identify key development and faith formation activities you will undertake to enhance your Catholic leadership competencies and practices to deliver on your performance goals for student achievement and well-being (e.g., retreats, system committees, Ministry of Education seminars/webinars, community partnerships, provincial or regional leadership roles, church and community engagement).</p>

<p align="center">Key Professional Learning and Faith Formation Activities</p> <p>Identify key professional learning and faith formation activities (e.g., retreats, Catholic professional reading, professional and parish committees, courses, conferences, professional networks, collaborations) you will undertake to enhance your Catholic leadership competencies and practices as a Catholic Director of Education.</p>

5. Prior to the Mid-Cycle Appraisal Review, add to any of the above action tables any pertinent information (“Indicators of Progress” and “Results/Outcomes”). Then, complete PART 2: Mid-Cycle Appraisal Review (see below):

PART 2: Mid-Cycle Appraisal Review

Please see Ontario Regulation [83/24: Director of Education Performance Appraisal](#) for the requirements of completing this section.

<p align="center">Appraiser’s Comments and Reflections for Next Cycle</p> <p>The appraiser(s) will comment on the director’s performance based on the results achieved (i.e., Part 1) and how the results were achieved.</p>	
<p>Comments</p>	
<p>Next Steps</p>	
<p>Mid-Cycle Meeting Attendees’ Name(s)</p>	<p>Date</p>



Director’s Comments and Reflections for Next Cycle
The Director of Education is provided the opportunity to respond to the committee’s evaluation and offer next steps in the cycle.
Comments (Optional)
Next Steps and Actions to be Taken (Optional)

6. Prior to the Final Performance Appraisal Report, add to any of the above action tables any pertinent information (“Indicators of Progress” and “Results/Outcomes”). Then, complete PART 3: Final Performance Appraisal Report. Be sure to include/check the overall rating (see below):

PART 3: Final Performance Appraisal Report

Please see Ontario Regulation [83/24: Director of Education Performance Appraisal](#) for the requirements of completing this section.

Appraiser’s Comments and Reflections for Next Cycle	
The appraiser(s) will comment on the director’s performance based on the results achieved (i.e., Part 1) and how the results were achieved (see O. Reg. 83/24).	
Comments	
Next Steps and Actions to be Taken	
<p>Overall Rating</p> <p>When determining which performance rating to assign to the director of education for the board, the committee shall consider the following factors:</p> <ol style="list-style-type: none"> 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 report required by executive performance consulting firm if applicable, and ii.) the information collected by the school climate surveys required by subsection 169.1 (2.1) of the Act in respect of the evaluation cycle, if applicable (Note: Full-cycle evaluation only). 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. 7. 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. 	<p>Overall Rating - Please check:</p> <p><input type="checkbox"/> Meets All Expectations</p> <p><input type="checkbox"/> Meets Most Expectations</p> <p><input type="checkbox"/> Meets Some Expectations</p> <p><input type="checkbox"/> Does Not Meet Expectations</p>
Director’s Comments and Reflections	
The Director of Education is provided the opportunity to respond to the committee’s evaluation, performance rating, and explanation for the rating.	



Comments (Optional)
Next Steps and Actions to be Taken (Optional)

7. Sign and date the document (see below):

Chair of the Committee's Name (Printed):	Director's Name (Printed):
Chair of the Committee's Signature:	Director's Signature (Indicating Receipt of Appraisal Report):
Date:	Date:

Note: The Director of Education Performance Appraisal Report must be retained for a period of at least six years from the date of the draft report.

Confidentiality Notice: This document and any enclosures are strictly private and confidential.

8. Save your file as a .docx file in order to be able to email the file.

Key Acronyms Used in the Appraisal Documents:

- BIEP** Board Improvement and Equity Plan
- ICE** Institute for Catholic Education
- MAAP** Math Achievement Action Plan
- MYP** Multi Year Plan
- PPM** Policy and Program Memoranda
- SAP** Student Achievement Plan
- SEAC** Special Education Advisory Committee

Appendix E

The Honourable _____
Minister of Education
c/o 13th 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 F

The Honourable _____
Minister of Education
c/o 13th 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) (interim or full)
performance appraisal of their Director of Education _____ in
(Name of Director of Education)

accordance with the Ontario Regulation ___/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