

Pacific Montessori Society

BUSINESS MANAGER APPRAISAL POLICY

Effective Date: July 4, 2024

POLICY STATEMENT

A properly conducted appraisal of the Business Manager benefits the individual in that role, enhances the relationship between the Business Manager and the Board of the Pacific Montessori Society (“the Board”), ensures accountability, fosters opportunities for strengthening the quality of the educational experience provided within the Selkirk Montessori community, and models the importance of systematic assessment throughout the school.

POLICY RATIONALE

A vibrant and effective Montessori school is dependent upon the quality of the leadership provided by its Business Manager. Appropriate appraisal processes provide meaningful feedback and contribute to the improvement of school leaders and, thereby, the effectiveness of the school. The Business Manager is accountable for their performance and a comprehensive appraisal process is one of the vehicles used to validate performance.

POLICY

I. Purpose

The appraisal of the Business Manager has the following purposes:

- To promote the professional growth and development of administrators.
- To recognize and encourage the use of effective administrative behaviours.
- To assist the Business Manager in assessing their own performance
- To ensure the duties and responsibilities of the position are being carried out as outlined in the job description.
- To provide a basis for decisions affecting salary and employment.

II. Appraisal Values

The appraisal process will:

- respect the dignity, confidentiality and anonymity of all participants,
- be inclusive by involving a cross-section of the school community,
- provide constructive feedback,
- affirm the partnership between the Board and the Business Manager by utilizing a collaborative approach, whenever appropriate and/or possible, and
- be fair, equitable, non-discriminatory, consistent and predictable.

III. Process and Timelines

As the legal entity responsible for the Pacific Montessori Society, the Board has the duty and authority to conduct a performance appraisal of the Business Manager. This will occur on a periodic basis, including a formative appraisal one year after the date of hire, a summative appraisal the second year, and a review every six years after that.

A committee of the Board (“the Appraisal Committee”) will be delegated with responsibility for identifying and hiring an independent evaluator and ensuring the appraisal process is reasonable, fair and based on a valid and reliable appraisal instrument.

A 360° survey will form part of the appraisal instrument. Although the list of survey recipients will be determined in consultation with the Business Manager, the following groups/individuals should be represented: the Head of School, students, teachers, parents, and support staff. A minimum of ten surveys must be distributed.

The Business Manager will participate actively in the appraisal process by completing a self-evaluation, using an instrument designated by the independent evaluator.

A meeting between the Business Manager and the Appraisal Committee will occur at least 15 working days before the appraisal is to begin to review the appraisal process and timelines.

Upon completion of the appraisal, a written report will be prepared by the Appraisal Committee and submitted to the Board for approval within 10 working days. The report will be reviewed by the Board during an *in camera* session at its next regularly scheduled meeting after receipt of the report. Once approved, the report will be forwarded to the Business Manager. A meeting to review the appraisal results will take place between the Board and the Business Manager within 20 working days following receipt of the report by the Business Manager.

During this appraisal review meeting, professional development goals and activities may be identified to assist a Business Manager whose appraisal results indicate areas requiring remediation, as determined by the Board. A timeline for demonstrating acceptable levels of improvement will be established and appended to the report.

The report and appendices, if any, will be signed by both the Business Manager and the Chair of the Board. The Business Manager’s signature indicates receipt of the report but does not necessarily signify agreement with its contents. A section for the Business Manager’s comments will form part of the report. The Chair’s signature signifies the Board’s majority agreement with its contents; minority opinions by individual members of the Board may be attached as appendices.

Copies of the report and appendices, if any, will be given to the Business Manager, and will be included in the Board’s confidential files. The original(s) will be placed in the Business Manager's personnel file, to be stored offsite.

IV. Appraisal Criteria

The criteria for an initial appraisal of the Business Manager will be based on the responsibilities defined in the Business Manager's job description.

The criteria for subsequent appraisals will be those defined by the Business Manager's job description plus any growth goals identified by the Board in the previous written appraisal report(s). Such growth goals may be areas requiring remediation or actions which must be taken to address trends, issues or external realities.

V. Appeals

If the Business Manager does not agree with any portion of the report or professional development activities as outlined, the Business Manager has the right to attach an appendix containing their views. This appendix must be submitted to the Board within 30 calendar days of the appraisal review meeting.

The Business Manager has 30 calendar days following the receipt of the appraisal report to request a review of the appraisal findings.

VI. Remediation and Probation

The process for a Business Manager whose appraisal report indicates areas requiring remediation is as follows:

- A Professional Development Contract, which includes an action plan, must be signed within 60 days.
- The Professional Development Contract must identify the indicators and/or areas requiring remediation.
- The action plan to correct these areas will be developed by the Appraisal Committee and approved by the Board and will include specific resources to be provided to the Business Manager, a schedule for periodic review of progress, and the types of evidence required to demonstrate satisfactory progress.
- The length of a remediation period cannot exceed 6 calendar months, excluding July and August.
- The Appraisal Committee must meet with the Business Manager at least monthly to assess progress and to provide assistance and support.
- A Business Manager on remediation is required to compile documentation of progress and improvement in the specific goal areas.

At the conclusion of the remediation period, a meeting will be held between the Board and the Business Manager to review the Business Manager's documentation to determine the degree of progress made and decide on the action to be taken:

- Remediation Completed—If the Business Manager has demonstrated satisfactory progress, including successful completion of all goals, they will be confirmed in the position of Business Manager.
- Remediation Extended—If the Business Manager has shown progress and has met some of the goals, the Professional Development Contract is revised, and the remediation process is repeated.
- Probation—If the Business Manager has not shown at least moderate improvement and has not met the majority of their goals, the Business Manager is placed on probation.

When a Business Manager is placed on probation, the following process is implemented:

- The remediation process is repeated, and a new Professional Development Contract is negotiated and implemented.
- Near the end of the probationary period, a second appraisal will be completed.
- The status of a Business Manager on probation means that the continued employment of the Business Manager is in question and that termination may result if performance appraisal results do not indicate improvement to the satisfaction of the Board.
- At the conclusion of the appraisal, a Professional Development meeting is held where the Board reviews the Business Manager’s documentation, the results of the appraisal and determines the degree of progress made.
- The Board will then determine the action to be taken. Possible actions include:
 - Probation Completed: If the Business Manager has demonstrated satisfactory progress, including successful completion of all goals, they will be confirmed in the position of Business Manager.
 - Termination: The termination of the Business Manager will be reported to the council of the College of Teachers, per the requirements of the *Independent School Act*.

VII. *Appraisal Process Evaluation*

The Board may review and evaluate the appraisal process upon completion of each appraisal and make changes to its process or instruments, as it deems necessary.

REFERENCES

Business Manager Position Description

Independent School Act

Society Act