



CODE Innovation Funds – Report: Upper Canada District School Board

23 August 2016

1.0 Overview:

During 2015-2016, **CODE Innovation Funds** received by the **Upper Canada District School Board** supported a focus on performance management for members of the Senior Management Team.

This focus was two-fold:

- Capacity building for goal setting in conjunction with the Supervisory Officer Performance Appraisal Process (SOPA) and;
- Establishing a process of peer evaluation through the use of “360 degree feedback” process in support of the SOPA and that incorporated elements of the Ontario Leadership Framework.

2.0 Goal Setting/Performance Management and the SOPA:

2.1 Prior to 2015-2016, some members of the Senior Management Team had not engaged a performance appraisal since the introduction of the SOPA process in District School Boards. Through the CODE Innovation Funds, a focus on goal setting and feedback in conjunction with the SOPA was introduced. Geisler’s (2012) work on performance management provided a general framework for this activity, which advised:

- Take inventory;
 - Know your goals for each person;
 - Know their goals too;
 - Watch the work with your “feedback glasses”;
 - Deputize more eyes and voices (to provide feedback).
- (Geisler, 189-190)

2.2 Executive Coaching expertise provided support to members of the Senior Management Team, resulting in: a vigorous reflection about long-term and short-term goals, “de-privatization” of the process of the SOPA among members of the Senior team, and an understanding about what presented as priorities in our respective assignments. This was accomplished through guided reflection with the Executive Coach about:

- Why the goals matter, and;
- How the goals identified in the individual performance appraisals for the Senior Management Team connect to the goals of the Board.

As well, access to Executive Coaching support allowed each member of the Senior management team to redefine their goals identifying as part of the SOPA, and; supplemental access to coaching at the conclusion of the SOPA process as a means to support goal setting for the next round of the SOPA process for 2016-2017.

3.0 Introduction of Peer Evaluation data to the SOPA Process:

In addition to supporting activities related to goal setting in conjunction with the SOPA, CODE Innovation Funds were used to introduce a stakeholder/peer evaluation component in the SOPA experience for all members of the Senior Management Team. This process was supported through an outside agency who assembled a 360 degree feedback survey tool, compiled results, and identified trends. These findings were introduced into the SOPA dialogue and served as an additional level of reflection for each member of the Senior Management Team. In some cases, the feedback served as a “reality check” on the level of interaction and implementation for key initiatives assigned to members of the Senior Management Team.

4.0 Conclusion:

Revisiting the value and purpose of the SOPA, through the use of facilitative services of an Executive Coach, engaged a wide range of feedback around performance. The “innovation” was grounded in revising our process for engaging performance management with the Senior Management Team, which required adjusting the mechanisms and design of the evaluation system. As well, the innovation required the development of a culture of shared responsibility that can be amplified through the robust deployment of the SOPA.

Through this process, we hope that we have a “next generation” process for using the SOPA in our District that places a greater emphasis on professional collaboration at the Senior Team level, invests in transparent practices, provides reflective and collaborative inquiry, and strengthens joint accountability in our effort to serve students.

Respectfully submitted,

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