

# 3.08B

## MERCY EDUCATION PROCEDURE 3.08B APPRAISAL OF BUSINESS MANAGERS

### Key Steps in the Appraisal of Business Managers in Mercy Schools

- B01 The College Principal manages Formal Appraisals and goal setting for their Business Manager, with the support of Mercy Education Limited when required.
- B02 A Business Manager is appointed for a period of five years. The Appraisal process is one element which informs a decision by the Principal to offer subsequent contracts.
- B03 Appraisal is conducted early in the fourth year of each contract.
- B04 The appraisal panel will consist of a Panel Chair, who is the Principal's nominee, a nominee of Mercy Education and a nominee of the Business Manager, one of whom must have had experience as a Business Manager. Principals may choose the MEL Group Finance Manager to chair the Panel and conduct the Appraisal process if desired.
- B05 In the third year of each contract, the Mercy Education Executive Officer notifies the Principal and the Business Manager in writing that an appraisal process will be conducted in the following year. The name of the Board nominee on the appraisal panel will be forwarded when the Principal has set the timeline for the Appraisal process. The Principal is required to appoint the Panel Chair and the Business Manager is requested to consider their nominee to the panel.
- B06 The appraisal process is conducted at and managed by the school. Any clarification required should be addressed to the Mercy Education Executive Officer and Group Finance Manager.
- B07 The Principal liaises with the Panel Chair, the Business Manager and panel members to confirm dates for the appraisal and to arrange a suitable time for a preliminary meeting.

- B08 Prior to the meeting Panel members are given the following documentation to examine and to identify areas of questioning required:
- the role description of the Business Manager
  - reports of the previous Appraisal where relevant
  - Goals developed at Annual Review Meetings since appointment or the previous Appraisal.
- B09 A preliminary meeting may be held at the school or by teleconference or arrangements may be made by email.
- B10 Both survey and interview may be used as components of the appraisal process. The Panel Chair should negotiate with the Principal any survey instrument they intend to use after consideration of examples provided by Mercy Education.
- These focus upon:
- The Mission, Ethos and Religious Dimension;
  - Leadership and Day to Day Management;
  - Management and Strategic Planning;
  - Working Relation with the Principal and College Executive;
  - Financial and Property Management.
- B11 When an agreed survey is to be used, panel members and the Business Manager should be consulted on the process and adopt or modify where appropriate. Agreement is reached in determining which groups of staff and how many staff, based on school structure and the particular role of the Business Manager, would be most informed to best respond to the survey. The survey is distributed to respondents and collected by the Panel Chair.
- B12 The Principal and panel members agree on the personnel to be invited for an interview by the panel during the interview phase. Business Managers may nominate respondents; however, final selection remains the responsibility of the Panel.
- B13 The Business Manager is asked to complete the self reflection report forward it to the Panel Chair prior to the interview phase. The Panel Chair then distributes it to other panel members.
- The self reflection is organised under the same headings as the survey and in each section addresses:
- Strengths and skills brought to this area and significant achievements in it during the previous years;
  - Challenges encountered in this area;
  - Ideas for development in the future.
- B14 To conduct the interview phase, panel members convene at the school, consider the self reflection and the survey results, and conduct interviews of targeted personnel to gain further insight into the performance of the Business Manager. There is a particular focus on the achievement of goals set in the Annual Review Meetings and previous appraisals where applicable.

- B15 A panel interview is conducted with the Business Manager to share information and views and to listen to and discuss the self-reflection Report. Panel members may also use this opportunity to investigate further, any matter that may have been raised in the surveys or during staff interviews.
- B16 The interview phase will generally be carried out over a full day.
- B17 The Panel Chair considers all information and material presented and prepares a draft report for panel members' consideration. The report will include:
- Date of the appraisal
  - Membership of the panel
  - Outline of the process used
  - A summary of the information obtained from any surveys used and interviews
  - A list of commendations based on the information contained in the report
  - A list of recommendations for the consideration of the Business Manager.
- The Chair, on behalf of the panel, may be asked to make a recommendation to the Principal regarding re-appointment of the Business Manager.
- B18 The panel members offer comment and feedback to the Panel Chair. After the appraisal panel has agreed on its final draft this copy will be forwarded to the Principal and the Business Manager. At this point, if there are errors of fact they may be corrected.
- B19 The final report is emailed to panel members and the Business Manager by the Panel Chair for electronic signature.
- B20 Copies of the final report are forwarded to the Business Manager, Principal, panel members and the Mercy Education Executive Officer for distribution to Board Directors.
- B21 The Board nominee on the panel may be invited to speak to the final report at a subsequent meeting of the Board of Mercy Education.
- B22 Following each appraisal, the Business Manager will develop a set of goals in the context of the strategic plan of the College, based on the recommendations of the panel. They may also articulate personal leadership goals that reflect aspects of individual or faith development. These goals will form the basis of annual goal setting and later appraisals. While being practical and achievable, the goals should also stretch the Business Manager to higher levels of performance. It is timely following an appraisal to give consideration to issues relating to the role description and workload of the Business Manager and consider the appointment of a professional mentor where this is deemed appropriate.

B23 Following an Appraisal the Principal decides whether a further contract will be offered to the Business Manager, taking into consideration past performance, outcomes of Annual Review Meetings, commendations and recommendations from past appraisals and the current appraisal report. The Principal's decision is forwarded to Mercy Education for Board ratification.