



PERFORMANCE MANAGEMENT FOR SUPPORT STAFF

BRIERLEY CE (VC) PRIMARY SCHOOL

Our Vision

Though we are many, we are one body. Together, we learn and grow.

God is at the heart of all we do, shining His light to guide us on our journey. Together, we face change and transformation with courage.

In love, we nurture all to be resilient, hopeful and aspirational; to become the very best version of ourselves, knowing that we are loved.

Each member of our school community is honoured and celebrated for their unique character and qualities: difference is met with dignity and compassion. Though we are many, we are one body.

Our community at Brierley stretches beyond the school, where we share God's message of love through our actions, our thoughts and our words as we continue on life's path.

INTRODUCTION

Following on from the Local Authority's recently introduced Job Evaluation Scheme and subsequent Performance Management criteria linked to incremental progression within the new Grades the local school scheme has been formalised and will encompass all Non-Teaching Staff in the School. However staff who are the subject of formal discipline or capability or attendance procedures will be temporarily excluded from these arrangements with the formal procedures taking precedence.

1. Performance Management for Non-Teaching staff is a process designed to support the development of staff in order to continually improve professionally, to raise standards and to contribute effectively to whole school improvement.
2. The school's policy is intended to ensure that the performance of each member of staff is reviewed and objectives set on at least an annual basis and that an exchange of views will take place between the member of staff and their line manager.
3. The benefits for the individual and the school through performance management of improved communication and enhanced individual and collective performance and development will require the continuous commitment of all those involved to the process.
4. The performance management scheme is designed to meet the following specific objectives:
 - a) To assist staff in performing their roles to the best of their ability and to maximise their contribution to the school's overall objectives
 - b) To identify individual training needs and support requirements of individuals
 - c) To highlight the potential that each individual has to develop within his/her current position or for another role
5. The process of performance management will be systematic, constructive in outcome objectives, fair in implementation and objective in assessments of performance.

THE PERFORMANCE MANAGEMENT CYCLE

The process involves a three-stage annual cycle. The annual Performance Management Cycle is defined as 1 April to 31 March in any year and is co-terminous with the financial year of the Local Authority and the School.

Stage 1— Planning/Preparation

The cycle commences with the line manager (or another manager deemed appropriate by the Headteacher) and the member of staff separately giving some consideration, prior to a formal meeting, to the individual's overall performance over the year, review of any targets/objectives set for that year, anticipation of targets/objectives that might be required in the next year, and training and support needs of the individual. This Planning/Preparation stage may be informal but some may find it helpful to focus and be clear and constructive by completing a pre-interview assessment sheet.

Stage 2 — The Meeting

1. The annual Performance Management meeting is an opportunity for the member of staff and line manager to review current performance and objectives and plan and agree the individual's performance objectives for the forthcoming year. The individual will usually be given 3 objectives with his/her line manager and the priorities and targets that have fed into the school's priorities and targets. In the same discussion the training and development needs for the individual should be discussed and documented.
2. The meeting needs to have the character of fair and objective assessments, open discussion, and clarity of communication and understanding of what is being required.
3. New employees joining the school part way through the year should aim to complete some initial objectives within 3 months of commencing employment. Line managers should ensure the objectives agreed could be realistically progressed in the remaining time left for that reporting period.
4. Where there are differences of opinion between the line manager and the individual in assessing performance and setting objectives, either party may seek the advice of another manager nominated by the Headteacher. The member of staff ultimately has recourse to the grievance procedure if they feel that they have not been fairly assessed or given realistic and reasonable objectives. But it is anticipated that this will only be used after all other options have failed.
5. A Performance Management Meeting pro-forma should be used to document the main points of the discussion and any issues requiring action.

6. Disagreements may be formally stated in the documented record of the meeting.
7. The line manager and the member of staff will be required to sign the documented record of the meeting.
8. In order to ensure consistency, fairness, and relevance in the performance management process the Headteacher will either undertake himself/herself or nominate one Senior Manager to moderate and countersign the documented records of Performance Management Meetings.
9. The Headteacher will endeavour to ensure that all Line Managers involved in the Performance Management of individuals receive appropriate training and/or guidance as soon as is practicable to contribute to the important role undertaken by them in this process.
10. The Performance Management Meeting should be scheduled in sufficient time to be completed before the end of the annual Performance Cycle (31 March) and especially if the Local Authority's arrangements for incremental progression is a relevant issue to be considered as an outcome of the meeting.

Stage 3 — Monitoring

1. After the Performance Management Meeting the line manager or other appropriate person nominated by the Headteacher will undertake regular observations of the individual both formally and informally and be in a position to make an informed judgement of their performance and progress against their objectives and overall performance by the end of the relevant Performance Management cycle.
2. All line managers involved with an individual's performance should have an opportunity to input their view by way of discussion with the "lead" manager prior to the formal Performance Management Meeting.
3. Line managers and members of staff are encouraged to have informal review meetings during the year. Usually these meetings will be brief to allow a quick "pulse check". If more time is required or priorities change, a more formal meeting should be arranged to discuss progress, amend any objectives and arrange training or support and formally record any agreed changes.
4. Individuals are encouraged to keep a record of their own professional development, agreed objectives, courses and training undertaken.

PERFORMANCE MANAGEMENT MEETING – SUGGESTED STRUCTURE

1. At the beginning of the annual Performance Management meeting both parties will discuss the previous year's objectives and assess performance against these objectives. Both the Line Manager and the member of staff will have an opportunity to make and have their comments recorded in the official record of the meeting. Where appropriate portfolio's of evidenced work or equivalent may be considered. In some cases of classroom based activities an assessed observation of the member of staff in the classroom may need to be organised prior the review meeting.
2. A general discussion covering any issues affecting performance at work may also be appropriate.
3. A discussion of objectives/targets for the forthcoming year will be discussed and should normally relate to departmental and/or whole-school plans and priorities. It is recognised that not all non-teaching roles readily present scope for targets/objectives/projects and involve routine-based and collective delivery where individual effect can be limited. However attitudes/approaches to task and flexibility to constantly improve and enhance delivery may be more appropriate objectives.
4. At the end of the meeting the line manager will complete a written review and record the new objectives. This is to include any formally identified training and development needs
5. If it is not possible to complete the statement at the meeting it must be completed within 10 working days of the meeting. The appropriate copies of the review should be forwarded to those identified by the Headteacher. Copies of the paperwork will be placed on an appropriate file and retained for a reasonable period for reference.

RELATIONSHIP OF PERFORMANCE MANAGEMENT TO INCREMENTAL PROGRESSION

The Performance Management Scheme may have relevance to the circumstances in which an individual member of the Non-Teaching Staff may progress up the spinal column points within their Job Grade in so far as, provided that the individual has not reached the maximum of their respective Grade, the outcome of the Annual Performance Management Meeting may be one of the criteria for either recommending the award of an increment in accordance with the Local Authority's arrangements for incremental progression.

In some circumstances it is recognised that staff undertaking very tightly defined roles and duties in restricted working patterns may have limited scope for both the setting of performance objectives and personal development/training opportunities. The school will endeavour to offer opportunities for such staff within the resources available and operational practicalities. However subject to

meeting the school's or the department's needs as whole and participating in essential activities, staff may exercise some choice to what degree they accept opportunities afforded them. Depending upon the relevant arrangements/criteria of the Local Authority for incremental progression non-participation or restricted participation in some performance objectives or personal development/training may hinder the individual's progression within the Job Grade increments.

CONFIDENTIALITY

1. The performance management meeting and record do not form any part of any formal disciplinary or capability procedures. However relevant information from review statements may be taken into account by those who have access to them in making decisions and in advising those responsible for taking decisions or making recommendation about performance, pay, promotion, dismissal or disciplinary matters.
2. Subject to 1. above the whole performance management process and, in particular, the statements generated under it will be treated with strict confidentiality at all times. Only the individual's line manager or, where s/he has more than one, each of her/his line managers and the Headteacher will be provided, upon request, with access to the individual's performance management plan recorded in her/his statement where this is necessary to enable the line manager to discharge her/his line management responsibilities. Individuals will be told who has requested and who has been granted access.
3. The individual plan and performance management documentation are personal and confidential documents and should be kept in a secure place. The principles and provisions of the Data Protection Act 1998 should be followed at all times by those who have access to the documents.
4. Copies of these documents will be placed on the individual's personal file.

OVERVIEW

Performance Management is much more than simply filling in forms or "going through a systematic process". It provides an important means of communication between members of staff and Line Managers with a written record of what is expected and where individuals can contribute to improvements and Managers can support, guide and train those individuals. It is essential that the paperwork is completed accurately and the process is approached and conducted seriously and professionally. Above all, development and performance improvement is essentially a continuous process that contributes to meeting the aims and priorities of the school.

COMPLAINTS

1. Within 10 working days of receiving a Performance Management meeting record individuals can record any dissatisfaction with the Line Manager's treatment of them, or the review of their performance, or the new objectives/targets set. All parties are encouraged to try and resolve issues arising from the performance management process by discussion at the lowest practical level and as expeditiously as possible, however if the individual remains dissatisfied they may register a formal grievance.
2. Complaints regarding the withholding of an incremental award should be made in the first instance to the Headteacher and if remaining dissatisfied an appeal may be made to a Panel of Governors.

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