

SUTTON CE (VC) PRIMARY SCHOOL



Performance Management of Support Staff Policy

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To be reviewed annually

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PERFORMANCE MANAGEMENT POLICY
For Support Staff in Sutton CE (VC) Primary School
Guide for Appraisers and Appraisees

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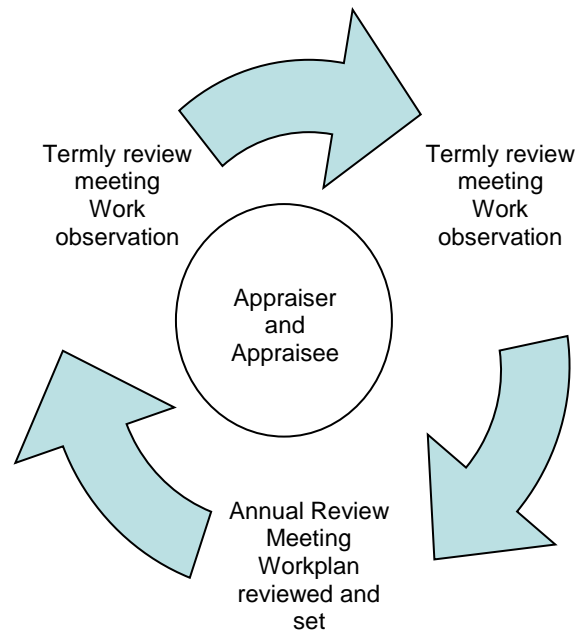
1. INTRODUCTION

1.1 Our school is committed to performance management to develop all staff and to improve the quality of service provided to pupils, parents and the school community. This policy covers all support staff except staff on short fixed term contracts of less than one term and those subject to the probationary period. It sets a framework for all support staff to agree and review priorities and objectives within the context of the school's development plan and their own development needs.

1.2 The school's Performance Management Scheme

- Is a continuous annual cycle
- links performance and the drive for continuous improvement and service
- is a rigorous approach to defining, assessing and rewarding achievement in the workplace
- ensures strong links to the School Improvement Plan
- increases the individual's understanding of how their job adds value to the organisation

1.3 The Performance Management cycle is:



1.4 We will implement our performance management arrangements on the basis of:

- fairness. We all need to be aware of the potential for unconscious discrimination and to avoid assumptions about individuals based on stereotypes; and
- equal opportunity. All support staff will be encouraged and supported to achieve their potential through agreeing objectives, undertaking development and having their performance regularly assessed.

2 THE ROLES OF THE APPRAISER AND APPRAISEE

- 2.1 The role of the Appraiser is to lead the process. The role of the Appraisee is to participate in and contribute to the process.
- 2.2 Employees are normally appraised by their immediate manager because those who delegate work and monitor performance are best placed to appraise performance.
- 2.3 It is the responsibility of each Appraiser to own the process and to communicate it to staff. The Appraiser is responsible for investing time, energy and skill so that:
 - Everyone is made aware of the advantages of performance management
 - Staff are clear about what is involved and are committed to their workplan
 - The Appraisers are responsive to staff queries and concerns
 - There is a consistent approach by all Appraisers

3 WORK PLANS

- 3.1 A workplan
 - Is a 'living' document to be discussed regularly by the Appraiser and Appraisee and revised as appropriate;
 - Is the primary documentation for Performance Management and the Annual review meeting. The workplan confirms the contribution required of the individual towards the achievement of the school's objectives, which are related to the School Improvement Plan.
 - contains
 - Objectives
 - Tasks/actions
 - Performance indicators
 - Deadlines for achievement
 - Evidence of achievement
 - Learning and development plan.
- 3.2 It is the Appraiser's responsibility to develop the workplan in consultation with the Appraisee. Objectives should reflect the key tasks and responsibilities of the individual's job and be challenging enough to raise performance. Easy to achieve objectives will not stimulate an individual or make best use of their potential. However, they must be realistic and balanced. The number of objectives set will vary according to the nature of the job and the level of responsibilities. Normally there will be between 4 and 8 objectives.

3.3 Discussions about the development of the workplan should be based around

- The School Improvement Plan
- Existing workplans
- Job descriptions
- Employee experiences of what is important in their job.

It should help the Appraisee to:

- give commitment to the School's Development Plan
- know how well they are doing
- look back on what has been achieved during the reporting period
- formally acknowledge and celebrate success
- create successful working relationships
- identify areas for improvement
- agree objectives for the next review cycle.

3.4 Where an individual has not achieved an objective it is important to establish the reasons for non-achievement since those reasons may inform future decisions and actions and the development of learning and development plans.

4 DEVELOPING STAFF

- 4.1 To ensure that staff development is directly linked to objectives on a collective and individual basis the Performance Management Scheme includes the following elements:
- Learning and development activity to support workplan delivery
 - Review of learning and development undertaken in terms of quality, impact on service and value for money at individual and school level

5 REVIEW MEETINGS AND WORK OBSERVATION

- 5.1 Review meetings are normally short one-to-one discussions between the Appraiser and Appraisee. Meetings should be regular, specific and positive to reinforce successful behaviour and encourage change where necessary. All staff need continuous feedback, praise and reassurance especially when they have done well and worked hard. Ways should be found to publicise and celebrate significant achievements.
- 5.2 Work observation will normally take place at least once per cycle. In planning observation, we will follow these principles:
- 1 successful observation requires preparation and training, and a clear understanding on the part of the Appraiser and Appraisee of its purpose;
 - 2 the format of the observation will depend on its purpose;

- 3 it is important that the observer ensures that the work proceeds in as normal an atmosphere as possible;
 - 4 full, constructive and timely feedback offers an opportunity to discuss what went well and what might be done better or differently next time. When giving feedback, the Appraiser should take into account the range of activities carried out by the Appraisee and the time spent on each activity.
- 5.3 Areas of under-achievement should also be discussed, but in a climate of support and encouragement rather than blame or punishment. Means of addressing under-achievement should be continually sought. However, there needs to be clarity that continued poor performance will be addressed via the capability procedure. Performance Management will be suspended if the capability procedure is invoked.
- 5.4 A brief note of the meeting and work observation outcomes should be retained by the Appraiser and Appraisee.

6 THE ANNUAL REVIEW MEETING

- 6.1 The annual review meeting is a structured discussion held between Appraiser and Appraisee. Its purpose is to assess overall job performance during the review period and find ways to improve and extend performance.
- 6.2 The meeting will have eight features:
 - 1 Share assessment of performance relating to the whole of the previous cycle - normally 12 months. These assessments will be based on the workplan, work observation and the review meetings of the period in question.
 - 2 Recognise and celebrate achievements.
 - 3 Identify areas where performance could be improved and agree ways of achieving this.
 - 4 Determine how the Appraiser can assist the individual to improve performance and where necessary improve the Appraiser's own input to the process.
 - 5 Establish a workplan for the following 12 months.
 - 6 Agree a learning and development plan
 - 7 Plan a programme of regular review meetings and work observation leading up to the next annual review meeting.
 - 8 A written record of the meeting should be retained by the Appraiser and Appraisee.

6.3 Effective Annual Review meetings have:

- Sufficient time and notice for both parties to prepare, and exchange information
- Proper preparation and identification of relevant information to support observations and assessments
- Discussion conducted in spirit of support and encouragement
- No surprises, initially problems should be raised during review sessions throughout the year
- Enough time allocated to do justice to the discussion
- An uninterrupted discussion which is private
- An open and honest two-way discussion with the individual taking the lead
- Documented conclusions and actions for both parties
- Commitment to any actions arising.

6.4 The record of the discussion and outcome of the Annual Review Meeting should be completed either at the meeting or shortly afterwards. The record should be countersigned by the Appraiser's own Manager. This will ensure an independent view of the process and should ensure consistency and fairness in the operation of the scheme. The record is maintained on the employee's Personnel file.

6.5 Relevant information from Performance Management documentation may be taken into account in making decisions and in advising those responsible for taking decisions, or making recommendations about performance, pay, promotion, dismissal or disciplinary matters.

7 PERFORMANCE RELATED PAY

7.1 The Headteacher will take into account Performance Management outcomes in making recommendations on salary in accordance with the school Pay Policy. This may include recommending the withholding of an increment for service which is less than satisfactory, or the awarding of an honorarium where the employee's performance exceeds that which could reasonably be expected and the employee has made a sustained and substantial contribution to the school.

7.2 Where an individual is aggrieved about a salary decision there is right of appeal in accordance with the school's pay policy.

PERFORMANCE MANAGEMENT SCHEME

The Workplan

Date last revised:

Personal Details:

Name:

Job Title:

Period from:

To:

Grade

Other details:

SIGNED: _____ (Post Holder)

SIGNED: _____ (Appraiser)

SIGNED: _____ (Appraiser's, Manager)

Date: _____

PERFORMANCE MANAGEMENT SCHEME

Objectives what you need to achieve, linked to business plan objectives	Task/Actions what you intend to do to achieve your objectives	Performance Indicators/Targets what you will use to measure how well you are achieving	Deadline for Achievement of Performance Indicators	Evidence of Achievement/ Comments

PERFORMANCE MANAGEMENT SCHEME

Learning & Development Plan

Objective (linked to workplan)	L&D Required e.g. Customer Care Method e.g. course, guided reading	Date (planned/undertaken)	Key L&D Objectives	Expected Outcomes (service delivery improvements)	L&D Outcomes*

* Were key L&D objectives met and Expected Outcomes achieved? If 'No', give reasons.

PERFORMANCE MANAGEMENT SCHEME

Performance Review including Annual Performance Review

Appraisee's Assessment (your own view of your successes, achievements, non-achievements against workplan)

Additional issues (secondment, learning and development, absenteeism etc.)

Assessment by Appraiser

Action required (agreed action points in order to deliver the workplan and learning and development activity)

SIGNED: _____ (Appraisee - Post Holder) Date: _____

SIGNED: _____ (Appraiser - Line Manager) Date: _____

SIGNED: _____ (Senior Manager –
Line Manager's, Manager) Date: _____

INDICATIVE TARGETS

POST: MEALS SUPERVISOR

Objectives what you need to achieve, linked to business plan objectives	Task/Actions what you intend to do to achieve your objectives	Performance Indicators/Targets what you will use to measure how well you are achieving
Supervision and control of pupils in the dining hall,	<ul style="list-style-type: none"> Organising dinner queue and entrance of pupils into dining hall and from dining hall to playground; ensuring good behaviour and calm atmosphere. Encouraging pupils to eat (including those with packed lunches) especially those with special needs or disabilities. Ensuring pupils tidy/clear up in a satisfactory manner. Cleaning up spillages where such spillages are hazardous to pupils/staff 	<ul style="list-style-type: none"> Order and discipline in the dining hall area is maintained. Lunch is eaten by all children. Dining area is cleared after lunch and all spillages cleaned.
Supervision and control of pupils in the playground and about other school premises	<ul style="list-style-type: none"> Supervision and control of the school entrance during lunch break to ensure children do not leave the playground without permission / authorisation. Check on any strangers who may enter school premises in accordance with school guidelines, 	<ul style="list-style-type: none"> Children remain in the playground. Vigilance of children is maintained and for strangers.
	<ul style="list-style-type: none"> Direction of pupils to the playground and supervision of their activities and behaviour, ensuring their safety and well being, providing emotional support where necessary 	<ul style="list-style-type: none"> Children play in a way that ensures their own and other children's safety. Accidents do not occur from inappropriate games or behaviour

INDICATIVE TARGETS

POST: CLASSROOM SUPPORT POSTS

Objectives what you need to achieve, linked to business plan objectives	Task/Actions what you intend to do to achieve your objectives	Performance Indicators/Targets what you will use to measure how well you are achieving
Follow agreed school procedures for caring for sick or injured pupils, administering first aid for minor injuries or sickness, taking home or to hospital if necessary, and generally giving comfort and care to such pupils	<ul style="list-style-type: none"> • Fill in injury note or accident report as appropriate • Administer first aid (if qualified) or refer pupils to first aider • Contact parents and teacher (as appropriate) in line with agreed school procedures 	<ul style="list-style-type: none"> • No complaints from parents of not being notified of injuries received at school • All accidents are properly recorded in record book
Look after and control the medical room. Keep a basic stock of first aid items and re-ordering as necessary.	<ul style="list-style-type: none"> • Keep medical room neat and tidy • Monitor stock levels and re-order stock before they run out 	<ul style="list-style-type: none"> • First aid items can easily be located by any member of staff • No recorded/reported incidents of stock running out
Generally care for and comforting pupils in times of distress or difficulty in accordance with Child protection guidelines.	<ul style="list-style-type: none"> • Reporting any such occurrence to teaching staff • Where appropriate intervene in and settle disputes between pupils 	<ul style="list-style-type: none"> • Pupils do not complain of staff ignoring their complaints
Making and assisting with the preparation of materials/equipment, helping pupils during the lesson or activity and with tidying up afterwards	<ul style="list-style-type: none"> • Help teacher to set up learning activities • Help teacher with the mounting and display of pupils work • Help pupils with tidying up at the end of a lesson 	<ul style="list-style-type: none"> • Attractive displays of pupils' work evident in classroom and school environs • Classroom is tidy and attractive • Contribution to learning is evident on teachers' lesson plans
Assisting small groups of pupils with reading or learning games under the direction of teaching staff	<ul style="list-style-type: none"> • Work with groups of pupils, keeping them on task • Motivate pupils to complete tasks • Give assistance to pupils with difficulty as appropriate • Make notes and observations on pupil progress and relate these to teacher 	<ul style="list-style-type: none"> • Notes are kept on pupil progress and feed into teacher assessments/ reports to parents

INDICATIVE TARGETS

POST: CLEANER

Objectives what you need to achieve, linked to business plan objectives	Task/Actions what you intend to do to achieve your objectives	Performance Indicators/Targets what you will use to measure how well you are achieving
Cleaning designated areas.	<ul style="list-style-type: none"> • Removing waste to designated areas • Putting away any teaching aids left on the floor • Damp dusting, wiping or polishing, as appropriate, all furniture and surfaces • Sweeping, vacuuming, mopping and washing hard all floor surfaces, as appropriate. • Clearing spillages of materials and removing resistant stains in the school's specialist areas, cleaning in accordance with agreed safe working practices • Cleaning of toilets and washrooms to the required standard • Replenish disposable items as necessary 	<ul style="list-style-type: none"> • Standard of cleaning is maintained. • No areas have to be attended to again. • No complaints from classroom staff.
Securing and safe storage of school equipment.	<ul style="list-style-type: none"> • Ensuring security within school • Ensure safe storage of all equipment when finished with. • Notifying Premises Officer of breakages and other safety hazards 	<ul style="list-style-type: none"> • Standard of security is maintained. • No complaints.
Working co-operatively as member of cleaning staff team.	<ul style="list-style-type: none"> • Good time keeping and attendance record. • Completion of individual tasks following instruction • Assist other team members when required. 	<ul style="list-style-type: none"> • Timekeeping and attendance record is good. • Tasks undertaken and minimum of checks required • Gives assistance to other team members.

INDICATIVE TARGETS

POST: SCHOOL ADMINISTRATIVE OFFICER

Objectives what you need to achieve, linked to business plan objectives	Task/Actions what you intend to do to achieve your objectives	Performance Indicators/Targets what you will use to measure how well you are achieving
Ensure accountability and probity in the management of school finances	<ul style="list-style-type: none"> Maintaining the school's financial systems and accounts. 	<ul style="list-style-type: none"> The HT/GB to have correct information on the schools financial position. Pass the annual audit
Ensure that the school office provides administrative support for teaching, learning and management of resources.	<ul style="list-style-type: none"> Ensure the smooth running of the school office. 	<ul style="list-style-type: none"> Administrative team supported and managed to ensure cover and work prioritised when necessary. Administrative services provided as agreed and need for improvements identified. Most enquiries / requests dealt with correctly and courteously by the office staff, whether from pupils, staff, parents or others. Referrals to other staff where appropriate.
Ensure that the school database of pupils (and staff) is accurate and secure and contains the appropriate information.	<ul style="list-style-type: none"> Maintaining the school's database on pupils and staff 	<ul style="list-style-type: none"> Ability to produce accurate and timely data
Ensure appropriate administrative staff in place to undertake required office tasks.	<ul style="list-style-type: none"> Assisting with the recruitment and selection of administrative staff. 	<ul style="list-style-type: none"> Office vacancies filled in accordance with agreed procedures, that appropriate staff are selected and provided with appropriate induction.