

HASSENBROOK SCHOOL Specialist Technology College



SUPPORT STAFF REVIEW MANAGEMENT POLICY

NOTES OF GUIDANCE

1. Introduction

The school is committed to providing a quality service to its pupils, parents and wider school community and staff have an important part to play in achieving this.

To be effective all staff need to be clear about what is expected of them to meet the school's aims and objectives and, alongside this, staff need to have access to appropriate learning and development to enable them to perform their job. The Performance Management Review Scheme (PMR) is designed to support the contribution each person makes by providing opportunities to regularly review performance and to plan their own learning and development. In this way the scheme aims to help the school provide more effective services, improve its own performance and enable staff to develop to their full potential within their current role. The scheme also provides for an objective measurement of performance, against which pay progression can be determined where appropriate.

The PMR scheme supports the Investor in People standard by agreeing outcomes/targets at the planning stage which will enable the postholder and reviewer to be clear about what is expected to be achieved. The scheme also satisfies the recommendations of the National Joint Council for Local Government Service staff that training and development provision should be "planned, delivered and monitored" and "should be at the forefront of [employer's] service delivery plans".

PMR is appropriate to all levels of support staff. This will enable the school's direction to be communicated to everyone, in a structured and consistent manner.

2. Purposes of the Performance Management Review Scheme

- communicate the school's strategic plans and objectives;
- give clarity to individual roles within those plans;
- set standards of performance;
- evaluate individual past performance and development;
- evaluate learning and development received;
- set service-related and personal objectives;
- plan individual learning and development;
- provide a mechanism for the assessment of pay progression (where appropriate) and in conjunction with the school's pay policy.

3. Performance progression

As part of the Thurrock Single Status Agreement, incremental progression will not be automatic. Incremental progression within the Band pay width will be subject to the member of staff achieving a good performance level as defined by the prevailing staff appraisal scheme at the time. Such assessments need to be undertaken in a consistent and objective manner and the PMR scheme provides the vehicle and the documentation by which decisions about performance progression will be made. It is important that within the PMR process the same standards are applied to all staff.

Awards can be determined by the Headteacher to teams or individuals where they have demonstrated outstanding performance. The Governing Body will monitor and approve these awards.

Assessment of performance which will lead to an incremental rise is straightforward. If the evidence demonstrates that all objectives have been consistently met or exceeded, an increment will normally be recommended.

4. Equalities

It is most important that the PMR scheme is operated in accordance with the schools' Equal Opportunities Policy. Through the scheme, decisions will be made which will impact not only on an individual's pay but on an individual's access to learning and development and consequently his/her opportunities for career/job progression. It is therefore vital that managers and all reviewers ensure that the scheme is operated in a 'non-discriminatory' way.

It is important for example that part-time staff and those on fixed-term contracts have equal access to relevant learning and development opportunities and that reviews of objectives and performance are based on evidence, rather than any pre-conceptions about race, gender etc. It is further important that staff are not disadvantaged due to absences for sickness, maternity or other similar absences.

5. Roles and responsibilities

The Governing Body

The role of the Governing Body is to determine the PMR process and to ensure that the PMR scheme and resultant performance progression decisions are operated effectively, appropriately and equitably for all relevant staff. The Headteacher will determine who should act as reviewing managers for staff and agree this with the Governing Body.

The Governors' Pay Committee will be responsible for making decisions about progression in the light of recommendations made by the reviewing manager. This may be delegated to the Headteacher where he/she is not the reviewing manager. The Pay Committee may occasionally mediate if the Headteacher and employee cannot reach agreement on the setting of objectives.

The Governors' Pay Appeals Committee will hear appeals against decisions not to award incremental progression for relevant staff.

The Headteacher

The Headteacher will be responsible for ensuring that the whole PMR process is completed and for ensuring other managers and staff have access to the relevant information and documentation necessary to undertake the process. The Headteacher will also ensure consistent standards of objective setting and evidence based assessment in relation to pay progression. The Headteacher may on occasions conduct the PMR reviews with staff.

The Headteacher will be responsible for making decisions about progression in the light of recommendations made by the reviewing manager. The Headteacher may occasionally mediate if the reviewing manager and employee cannot reach agreement on the setting of objectives.

Other Managers

Where so determined, relevant line managers, other than the Headteacher, shall act as reviewing managers within the PMR process.

All managers will be responsible for supporting staff in their achievement of objectives and in securing access, where possible, to relevant learning and development opportunities.

Employees

Employees will demonstrate a commitment to continuous development and will work with their managers and others to set and achieve objectives and provide appropriate evidence.

6. Confidentiality

PMR forms will not be kept on individuals' personal files. They contain sensitive information and should be stored securely. The PA to the Headteacher will retain the original of the form and a copy should be kept by the Line Manager and individual employee.

Learning and development needs identified by the scheme may be shared with the Headteacher, Governing Body and training co-ordinators, in order to assist planning and to provide for appropriate learning opportunities.

THE PERFORMANCE MANAGEMENT REVIEW PROCESS

1. Introduction

PMR is a process whereby staff have an annual, planned meeting with their line manager in order to discuss achievements and learning experiences, communicate strategic plans and objectives, identify areas for development and set plans and targets for the current year. Full PMR meetings will be held on an annual basis with review meetings carried out during the year as appropriate. Review meetings are important to ensure that plans are kept up to date in times of rapid change. The review cycle will run annually from January to December.

2. Preparation

When preparing for the review meeting the following papers will be needed:

- Job description/job profile.
- Last year's completed PMR forms and any updates from review meetings.
- A blank copy of the PMR forms.
- Details of learning and development achieved over the last year.
- Relevant school development and other action plans and a copy of the school's Mission Statement.

These documents will be useful for both the post-holder and the reviewer and will provide the basis for the agenda of the review meeting. It is important that adequate time is allowed to prepare for the review meeting and 7-10 days is recommended. A time and place should be agreed in advance and adequate, uninterrupted time should be allowed for the meeting.

3. The PMR review

The following should be read in conjunction with PMR forms which should be completed at the review meeting.

Statement of Job Purpose

In order to review performance and identify areas for development, it is important to be clear about the purpose of an individual's role. The PMR process provides a good opportunity to update these documents if necessary. The statement of job purpose needs to be short, clear and to accurately reflect the main purpose of the role.

At the review meeting:

- Discuss the job description and agree any changes.
- Agree the statement of job purpose.
- Discuss general school plans and objectives (with reference to the school's Mission Statement, School Development Plan and other plans e.g. OFSTED action plan) and be clear about how these impact upon the individual's role.

Review of Last Year's Objectives

In order to support achievement and development, it is important to reflect upon things that have gone well over the last year, as well as any areas of difficulty. Where appropriate, refer to last year's objectives and any other papers that have been used to update these during the year.

At the review meeting:

- Consider how things have gone in the last year.
- Identify main achievements.
- Identify performance against previously set objectives.
- Review contribution to the school.
- Identify areas that could have been more effective.

Review of Last Year's Learning and Development

Using the training/aspirations sheet, consider training and development received, particularly focussing on the impact this has had on performance and on meeting the objectives of the school.

At the review meeting:

- Review learning and development received
- Consider how the learning and development have helped in the job.
- Consider how the learning and development have benefited the school.
- Identify improvements in performance as a result of learning and development opportunities.

Training and Aspirations

In order to be effective in a role and for performance to progress, staff will need to learn and develop new skills, knowledge and competencies and to gain experience. It is therefore helpful to keep a log of learning and development opportunities and experiences.

Training is an obvious way in which to gain new skills and knowledge but training is not just about attendance on courses. The most effective learning and development often takes place in the workplace for example through:

- practice and experience
- coaching and work shadowing
- project work and reading
- job rotation
- observation

Identification and review of learning and development play an important part in the PMR process and it can be useful to keep a log of learning and development experiences as they occur. Forms for this purpose are included in the scheme.

Objectives

Now, building on the review of last year's objectives and development plan, prepare an outline of objectives for the next 12 months. There should be at least 3 objectives. Objectives:

- Should, where possible, be linked with the school's objectives, taken from the school development plan and other relevant plans.
- Relate to the job description.
- May be competency objectives relating to the person specification/profile of the job.
- May also be drawn up on a team basis where appropriate.
- Can be both immediate and longer term.
- Need to reflect the purpose of the job.

Objectives should meet the SMART criteria:

Specific	are they precise and clear ?
Measurable	are they attainable and realistic and include quality and quantity measures ?
Achievable	will they be stretching but practical with a successful outcome ?
Results-orientated	will you know when the objective has been achieved and how ?
Time-bound	have realistic timescales and deadlines been built in ?

At the review meeting:

- Agree objectives related to the job and the competencies required to fulfil the role.
- Identify how these link to the school's plans and targets.
- Identify the action needed by both post holder and their manager (or others) in order to enable the objectives to be met.
- Identify the evidence which might demonstrate that an individual objective has been met (see below).
- Determine timescales for the achievement of the specific objective – these may be different for each.

Evidence

It is important at this stage to suggest the types of evidence that would show how the objectives will be demonstrated. These will be open for review during the year and other evidence may be shown as and when it arises, but an initial discussion will ensure that it is clear what sort of evidence will be suitable.

Evidence may include:

- Feedback from customers and observations by managers.
- Completed pieces of work and examples of good practice.
- Structured discussion with managers.
- Statistical information.
- Written reports, letters etc.

The evidence identified should be that which is usually generated from daily work and should not involve significant extra written material.

Both the employee and the reviewing manager will be required to sign the PMR form to indicate their agreement to its content.

Interim Reviews

Interim reviews should be held, ideally twice a year, in order to:

- Review progress against objectives.
- Identify outstanding learning and development needs.
- Sign off completed objectives (where sufficient evidence has been provided).
- Amend or replace objectives which are no longer valid (amended or replacement objectives should be entered onto the original PMR form).

4. The end of year review/assessment

At the end of the review year, the employee and line manager should meet to review the previous year's objectives and learning and development. Outcomes of objectives should be recorded. At the end of the review the line manager will also make a recommendation regarding incremental pay. All objectives will need to have been consistently met or exceeded in order for a recommendation of an incremental increase to be made.