CARDINAL POLE CATHOLIC SCHOOL

Appraising Policy Support Staff

Approved by Governors	Signed:		Date:	25/01/2017

Review due date (3 year):	Jan 2020

Contents

1. **Cardinal Pole School Vision**

Cardinal Pole Catholic School is a learning community for all based upon partnership and respect. It is a strong and vibrant place which recognizes the importance and individual needs of every pupil and member of staff. Praise and encouragement is vital in creating a climate of learning and high expectations supported by teaching of the highest quality. The school is full of confident, creative and fulfilled young people and staff. They are celebrated as individuals – unique creations of God – who deserve our support, love and trust as they begin the great journey of life.

2. **Mission Statement**

Cardinal Pole is a Roman Catholic School with a Christian commitment to building community through the individual care of pupils and staff. Within the school we share a common faith which, while recognising the values of all cultures and ethnic groups, promotes understanding of and respect for the values of the Gospel. As teachers or non teaching staff in a Catholic School we promote what we believe and understand of the Christian truths which refer us back and lead us to Christ. We are conscious that in trying to do so we are subject to various pressures e.g. ever changing educational ideologies and the materialistic bias of the society in which we live. Nevertheless, there are certain criteria, which underpin our work as teachers and non-teaching staff. All members of staff should facilitate the development of skills and knowledge in pupils and help them to understand that God is glorified through the acquisition and good use of knowledge. All members of staff should in their behaviour and attitudes set positive examples for pupils and encourage them in the practice of their faith. The school seeks to foster close relationships between school, home and the local community in particular by increasing their faith. In our daily assembly we attempt to bring before God our work and the needs and concerns not only of the school but of the wider community.

3. **Introduction**

Performance Management is a process to support the development of support staff to continually improve performance and develop skills, experience and careers.

This policy sets out the parameters of the process and covers the following:

- Aims of the Process
- Levels of Responsibility
- The Review Cycle
- 360 Degree Feedback

Also included is information for both managers and members of staff on how to prepare objectives and conduct a review.

4. **Aims of the Process**

In undertaking Performance Management, the aim of the school is to create an open and participative environment where support, guidance and direction is provided to support staff so that they can deliver the best possible service to pupils, parents, staff, governors and members of the community and as a result deliver the non teaching support required to deliver an outstanding Ofsted grading for the school.

Performance Management is designed to fulfil the following aims and objectives:

- Review past performance in meeting objectives
- Link future objectives and targets to the School Development Plan and current priorities
- Set individual targets and objectives
- Identify training and development needs

- Enable staff to receive constructive feedback from their manager
- Provide an opportunity for staff to give constructive feedback to their line manager
- Acknowledge successes and achievements
- Identify areas for improvement in individual performance
- Review job descriptions and consider any changes which might be necessary

5. Levels of Responsibility

The Governing Body is responsible for:

- Ensuring that the Performance Management Policy is incorporated into the school's development plan
- Agreeing the Performance Management Policy with the Headteacher

The Headteacher is responsible for:

- Designing and implementing the schools Performance Management Policy
- Carrying out Performance Management reviews of Senior Managers managing support staff
- Ensuring that all managers carry out their responsibilities and undertake performance reviews of their staff
- Ensuring that individual plans and objectives are agreed for all support staff and that professional development is targeted
- Identifying areas of concern within review statements and addressing these issues with the manager concerned
- Acting as a review manager to review any complaint by a member of support staff with any aspect of their review

The Manager is responsible for:

- Setting objectives for the year ahead, ensuring that objectives relate to job descriptions, school priorities, special projects and personal development
- Monitoring progress against the agreed objectives throughout the year
- Meeting with the member of staff to review performance and identify achievements, including assessment of achievement against objectives and to discuss and identify professional needs and activities
- Writing a review statement and giving a copy of the statement to the member of staff within 5 days of the final performance review meeting and allowing 5 days for the member of staff to add any supplementary comments
- Ensuring all relevant documentation is completed and counter signed by the member of staff concerned
- Passing the completed performance review statement to their Senior Manager

The employee is responsible for:

- Agreeing objectives and an individual plan for the year ahead with their manager
- Participating fully in the Performance Management review process and ensuing that their views and ideas are expressed
- Completing all review documentation

6. The Review Cycle

There are four stages to the Performance Management Review:

Stage 1 - Planning: Agreement of objectives and individual plan

Stage 2 - Monitoring:	Reviewing performance and progress throughout the year. Providing supportive action as needed
Stage 3 - Review:	Annual review meeting between the member of staff and manager to assess performance against objectives, review objectives and identify development needs
Stage 4 - Development:	A personal development plan

The length of the review cycle will be one year and will run from the 1st April to 31st March.

7. Stage 1 – Planning

As planning is the first stage of the review, it is important for the manager and staff member to identify the focus of work for the year ahead. Whilst a job description will already be in existence, the manager and staff member should jointly review the job description ensuring it is up to date and has incorporated new initiatives or challenges that apply to that particular post.

The next step is to agree specific objectives for the coming year. These objectives should focus on delivering the best possible service to pupils, parents, staff, governors and members of the community and as a result deliver the support required to deliver an outstanding Ofsted grading for the school, as well as improving and developing individuals skills and careers.

In setting objectives, Managers are advised to follow the SMART model for objective setting. Please see **appendix 1** for an explanation of SMART objectives.

No more than six objectives are to be set and agreed with the member of staff. All objectives should be recorded and these will apply for the review period, unless they need to be amended due to a change in circumstances.

If the member of staff disagrees with the objectives, the matter should be referred to a Senior Manager in the first instance or if necessary the Head Teacher for resolution and should not be left unaddressed.

A member of staff's individual plan agreed with the team leader will incorporate training and development which will be recorded on a Personal Development Plan (see Stage 4).

Sample forms for undertaking the planning stage of the performance management review are attached in **appendix 3**

Stage 2 – Monitoring Progress

To ensure the Performance Management process is successful and motivates the member of staff it is important that regular reviews are carried out throughout the year to ensure the objectives are still relevant.

Monitoring should take place at the least every three months and be undertaken during line management meetings.

Stage 3 – Reviewing Performance

A performance review should be carried out annually between the manager and member of staff. The review presents an opportunity to recognise the achievements of the member of

staff over the previous year and to identify key areas for improvement and professional development.

To ensure that the review covers the key areas of achievement and development, it is important that both the member of staff and manager prepare for the meeting.

Appendix 2 provides a good structure for both the staff member and manager to follow in order to ensure that a review is successful.

After the review the line manager will write up the review notes, this will be kept as a formal record on the staff member's personal file.

The line manager will give staff member a copy of the notes to check for accuracy and to add any comments.

The staff member's signed copy should be returned to the manager who will also sign it.

The line manager should take two copies of the final completed review; the original copy should be passed to the staff member, the manager should keep one copy and the second copy to be passed to the HR Officer to be kept on record.

During the review areas of professional development should have been identified by both the member of staff and manager. These should be recorded on a personal development plan. See Stage 4 below.

Stage 4 – Personal Development Plan

Personal development planning is a vital component of the review process. Although a personal development plan should be a continuous process that ensures needs are met as they arise, the review process will most likely provide objective information from which to develop a new or existing personal development plan.

The last stage of the review cycle is therefore to ensure that all development points which have been raised in the performance review are consolidated into a new or existing personal development plan.

Personal development plans should be reviewed at least every three months by managers, although they generally should be incorporated into the day today management of staff members.

8. 360 Degree Feedback

360 Degree Feedback is when a member of staff collects feedback from their colleagues or 'customers' in order to provide evidence of achieving an objective.

Both managers and members of staff may wish to use 360 Degree feedback where the measurement of an objective is likely to be more qualitative than quantitative.

Managers should seek to include a 360 degree feedback component into the reviews of staff members who are heavily customer focused or work remotely from their manager.

This has the twofold benefit of enabling the manager to see evidence of 'customer' satisfaction and for the staff member to not only provide evidence that they are meeting their objectives but also to highlight additional work that their manager is unaware of which deserves recognition.

9. Summary

Managers should meet with staff once a year for review purposes to set and agree work objectives and review progress on objectives set previously.

Managers should meet with staff regularly throughout the year to review and monitor the progress of objectives and agreed targets.

Managers will set objectives and review staff performance.

Objectives must be set which take into account training and development needs of the individual staff member.

The manager will write up the review notes that will be kept as a formal record on the staff member's personal file.

The staff member will sign the review form and add any comments. Where a staff member is not satisfied with the meeting or the written note, they may ask for a meeting with a senior manager.

The staff member's annual review and development form may only be disclosed to the Manager, Senior Manager and Headteacher.

Appendix 1 - Guide to Setting Objectives

Overview
In setting objectives, Managers are advised to follow the SMART model for objective setting. SMART objectives are as follows:

S pecific
M easurable
A ction oriented
R ealistic
T ime Bound and Trackable

Specific & Stretching
Objectives have to be clear and concise and relate to one issue only. They should also provide the reviewee with a challenge so that they will learn and develop as a result of the challenge

Measurable
If objectives are measurable, they will avoid factual disagreements and subjective assessments, and it will also be easier to monitor progress. Descriptive objectives can also be measurable, doing something "better" or "more accurately" does not provide a quantifiable measurement necessary to determine whether the objective is met but provides a standard for comparison and progress measurement.

Action oriented
The objective should be worded in a way which explains what needs to be done in order to achieve the objective e.g. create, prioritise, learn, reduce, develop, increase, improve, raise performance,

Realistic
Realistic objectives are practical, achievable and possible. Objectives must motivate members of staff to improve and to reach for attainable ends. The member of staff executing the objective must feel "I CAN DO IT".

Realistic objectives are a balance between what is hard and easy to achieve.

The degree to which the objectives are achieved should impact directly on fulfilment of the role. If there is no impact, the objective is probably irrelevant.

Time Bound and Trackable
Time constraints encourage action to get the objective completed. Time constraints and deadlines must be precise to promote the urgency needed to move toward achieving objectives. If a member of staff's progress cannot be monitored, it is a poorly written objective and should be reworded.

Trackable objectives provide the opportunity to obtain warning of deviations, 'fine tune' performance, and coach for further development. If objectives are not trackable, not only is it impossible to monitor progress, but also vital opportunities for routine appraisal discussions are being missed.

Appendix 2 - Preparing for the review and development meeting

Member of staff:
In preparation for your review and development meeting you should have a copy of:

- your current job description
- your last review and development form (or the objectives and targets set for the last year)

Consider the objectives set last year and think about:

- what you see as your achievements and successes
- what went well and what could have gone better
- any factors which helped/hindered you achieving your objectives/targets
- any training and development that you undertook in the last 12 months and its relevance/usefulness to you either personally or in enabling you to carry out your job
- any work you carried out which is not covered by your objectives or was not planned
- any knowledge or skills gaps you would like to work on
- what you would like to achieve in the year ahead
- your own personal and career development
- things which would enable you to achieve your objectives/targets better (for example, training needs)
- What support you have received from your manager to help you achieve your objectives and carry out your job. Is there any specific action your manager could take to help you further?
- your job description: is it clear/does it accurately reflect your duties?

If you did not have objectives set (for instance if you have completed less than one year's service at the Trust) it may help to refer to your job description or any supervision notes in order to consider your main achievements and challenges to date.

Line manager:
In preparation for your review and development meeting with a member of your staff you should have access to:

- a job description for the member of staff
- a copy of the staff supervision notes
- last year's objectives/targets staff member's

With these in mind you should consider:

- achievement or non achievement of objectives/targets set by the member of staff and also the reasons which may have prevented any objectives being performed effectively
- the way in which the staff member's current job relates to, and how it fulfils the criteria outlined in the corporate plan
- potential objectives/targets set to take account of Equal Opportunities implications
- staff strengths and weaknesses prior to the process in order to provide constructive feedback in reviewing their progress and setting new targets
- any training needs that the staff may have

In addition you should:

- have a brief meeting with the member of staff a week before the review meeting to clarify the process and share paperwork so that there are 'no surprises" plan the timing of the review discussion
- book a room for the meeting (make sure that you will not be interrupted)
- arrange office/duty cover
- have all the papers to hand (job description, review and development guide & forms, any notes, operational plan)

During the review and development meeting

Member of staff and line manager should consider the accuracy of the job description and current work objectives. Your manager will ask you to think about your previous objectives in order to review what you have achieved. If you do not have set objectives, go through the main areas of your job description. You will also discuss achievements in the year not planned.

The manager should use open questions (who, what, how etc.) to find out what factors helped/hindered the member of staff to achieve their objectives. This should highlight any training or developmental needs or external factors, which may contribute to or inhibit the member of staff in their work.

You should both agree realistic and measurable targets and objectives for the year ahead. You should also agree set standards for meeting these objectives.

It will help if you:

As the Line manager:
- are welcoming and put the staff at ease
- make sure there is no interruption
- think of the review as a 2 way conversation (though the emphasis should be on the staff member)
- explain the purpose and positive aspects of the process
- use constructive language

As the member of staff:
- prepare your feedback before the meeting
- consider your objectives/targets and how your manager has assisted in helping and guiding you in the performance of your job and achievement of your objectives
- give specific examples of actions which could be taken by your manager to help you do your job better
- concentrate on key points rather than a long list
- stick to the facts - avoid personal conflict.
- be constructive: if you are giving negative feedback try and think of some suggestions / solutions to the issues you raise

Remember - feedback is a two way process. It is not always easy receiving or giving feedback. Both staff and the line manager should feel able to give and receive feedback without interruption.

If appropriate, agree action to improve ways of working which may help both of you to carry out your jobs more effectively - be constructive with your feedback. Most importantly, try to end on a positive note.

Comments

Line manager's comments:
Line managers should use this section to draw out good performance and praise achievements. They should also address areas needing improvement and invite suggestions on how things can be improved. They should give clear and honest feedback.

This can be done either throughout the review so each aspect is covered or at the end.

Whichever method is chosen the manager should ensure key points are summarised and recorded to ensure mutual understanding.

Member of staff comments:
This section provides an opportunity to give honest and open feedback to your line manager.