**Non-Teaching Staff Performance Management 2022/2023**

1. Target Setting 2. Mid-year Review 3. Annual Appraisal

(Tick box 1 – 3, as appropriate)

**Meeting Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Reviewee name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Reviewer name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Part A**

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| Objective 1  1.1 | Job Description Point: |
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| Review of target: | |
| Evidence of success | |
| Target: Not Met Met Exceeded | |
| Future consideration/planning notes | |

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| --- | --- |
| Objective 2:  2.1 | Job Description Point: |
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| Review of target: | |
| Evidence of success | |
| Target: Not Met Met Exceeded | |
| Future consideration/planning notes | |

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| **Objective 3:**  3.1 | Job Description Point: |
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| Review of target: | |
| Evidence of success | |
| Target: Not Met Met Exceeded | |
| Future consideration/planning notes | |

**Part B**

**Professional Development Intentions/Resource Needs**

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| Reviewers/target setters must identify, with their reviewee, **three specific areas** that are identified as CPD.  1.  2.  3. |

**First Meeting**

**Reviewer Summary**

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**Reviewee Comments:**

**Reviewee……………………………………… Date ………………**

**Reviewer ……………………………………… Date……………….**

**Mid year meeting**

**Reviewer Summary**

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**Reviewee Comments:**

**Reviewee……………………………………… Date ………………**

**Reviewer ……………………………………… Date……………….**

**Final Meeting**

**Reviewer Summary**

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**Reviewee Comments:**

**Reviewee……………………………………… Date ………………**

**Reviewer ……………………………………… Date……………….**

**Pay Recommendations Yes/No Signed ……………………………………(Reviewer)**

**Performance Management Review / Target Setting**

**Guidance Notes – Support Staff**

**Before the Review:**

* The reviewer and reviewee should agree on an appropriate time/date/venue for the Performance Review to take place. As a guideline, this should be approximately 2 weeks prior to the agreed date to allow both parties sufficient time to prepare.
* The reviewee should complete a: Self Review and Agreed Objectives and Development record in draft form and where possible give a copy to their reviewer prior to the meeting.
* The reviewee should also think about any amendments to be made to their job description / person specification and discuss these with their reviewer during the review meeting. Copies of any job descriptions already on file will be provided with performance management paperwork on a yearly basis.
* The reviewer should give consideration to the appropriateness of the venue for the review meeting. The reviewer should also think about the length of time that the review is likely to take in order to ensure that the reviewee is given undivided attention.

**Review of objectives**

The purpose of this section is to give an opportunity to reflect on objectives and developments since the last review. The reviewee will comment on the progress he/she has made towards achieving the agreed objectives that were set at the previous review, highlighting any difficulties and challenges. Following meaningful discussions, the reviewee will also indicate if previous targets were:- not met, met or exceeded, by ticking the appropriate box. If the Reviewee has not had a review before then reference should be made to the job description, team/department objectives or anything identified previously.

**Evidence of success:** Self Review

This section is an opportunity for the reviewee to describe and give examples of what has been achieved in their current role and think about how things have gone in the last year and what is going to happen in the coming year. This will also allow the reviewee to think about their role in depth and enable them to set future personal targets.

Development Record:

The reviewee should comment on any development they have undertaken since the last review. They will also comment on the benefits of the development and how they have applied what they learned.

It is strongly advised that the reviewee updates the Development Record regularly throughout the year to form a Continual Professional Development (CPD) record.

**Objectives for the Forthcoming Year:**

The context for discussing and agreeing objectives will be the goals and targets of the Academy /Department as well as the wider context of school priorities.

Key performance areas have been outlined, with the facility to add an optional further personal objective. As a guideline, 3 - 4 key objectives are recommended.

Individual objectives should be identified by:

1. Job specific development areas – objective should be set based on the previous years development area and should relate directly to the role.
2. Departmental – objective should be set based on team / departmental needs
3. School Improvement Plan – this objective should be directly linked to the plan.
4. Additional objective if required – this is an optional objective should the reviewee have an additional development area that was derived from their review of previous objectives or have an additional responsibility within their role.

Objectives should be **SMART**, i.e.:

**S**pecific – Objectives should specify what they want to achieve

**M**easurable – You should be able to measure whether you are meeting the objectives or not

**A**chievable – Are the objectives you set achievable and attainable?

**R**elevant – Can you realistically achieve the objectives with the resources you have?

**T**ime bound – When do you want to achieve the set objectives?

**Part B: Professional Development Intentions/Resources**

The purpose of Part B is to identify the development needed to support the achievement of the agreed objectives, for the year ahead.

In addition, this section is to devise a meaningful development plan that addresses any gaps in knowledge and skills to enable the reviewee to achieve their objectives.

An effective development plan is more that just identifying courses to attend. There are a number of available options, which might include:

* Self-directed learning
* Online Hay training courses
* Joining networks
* Representing the school in the wider community
* Shadowing a more experienced colleague
* Coaching
* Research
* Trade shows/exhibitions
* Industrial updating
* Establishing new links
* Membership of Professional Bodies
* Competitions
* Visits to other schools

Within the plan, there will be a requirement to clearly identify which objective(s) the proposed development relates to.

**Additional Comments/Information:**

It is important to give the reviewee the opportunity to raise any other issues, for example:

* Skills/knowledge that the reviewee might have that could be of interest/use to the school
* Personal circumstances that either permanently or temporarily impact on how the reviewee carries out their role (e.g. disability, caring responsibilities)

The review is not the appropriate forum to discuss disciplinary matters, performance issues, grievances, etc. Issues such as these should be raised and dealt with as they occur rather than stored up to discuss in the review.

**After the review:**

Once the Performance Review paperwork has been completed, it should be passed to the reviewee to read and sign. All reviews must also be passed to the Head of Department for final approval and signing. The reviewer should retain the original paperwork, with additional copies taken and passed to both the reviewee and the HR Manager.

**Interim Review**

The purpose of this meeting is to review progress against the objectives and development plan and, if appropriate, make adjustments. If changes are made, it is the responsibility of the reviewer to inform the HR Manager.

This session should be less formal and staff are not required to complete any additional paperwork, unless there are significant changes that should be recorded.

**Appendices**

**Examples of Core Standards/ Objectives for Support Staff roles**

**Teaching Assistants**

The four themes The Professional Standards for Teaching Assistants are set out in four themes.

1. Personal and professional conduct

2. Knowledge and understanding

3. Teaching and learning

4. Working with others

Within each theme there are several standards expected of teaching assistants.

**1.Personal and professional conduct**

Teaching assistants should uphold public trust in the education profession by:

· Having proper and professional regard for the ethos, policies and practices of the school in which they work as professional members of staff.

· Demonstrating positive attitudes, values and behaviours to develop and sustain effective relationships with the school community.

· Having regard for the need to safeguard pupils’ well-being by following relevant statutory guidance along with school policies and practice.

· Upholding values consistent with those required from teachers by respecting individual differences and cultural diversity.

· Committing to improve their own practice through self-evaluation and awareness.

**2.Knowledge and understanding Teaching assistants are expected to:**

· Share responsibility for ensuring that their own knowledge and understanding is relevant and up to date by reflecting on their own practice, liaising with school leaders, and identifying relevant professional development to improve personal effectiveness.

· Take opportunities to acquire the appropriate skills, qualifications, and/or experience required for the teaching assistant role, with support from the school/employer.

· Demonstrate expertise and skills in understanding the needs of all pupils (including specialist expertise as appropriate) and know how to contribute effectively to the adaptation and delivery of support to meet individual needs.

· Demonstrate a level of subject and curriculum knowledge relevant to their role and apply this effectively in supporting teachers and pupils.

· Understand their roles and responsibilities within the classroom and whole school context recognising that these may extend beyond a direct support role.

**3.Teaching and learning Teaching assistants are expected to:**

· Demonstrate an informed and efficient approach to teaching and learning by adopting relevant strategies to support the work of the teacher and increase achievement of all pupils including, where appropriate, those with special educational needs and disabilities.

· Promote, support and facilitate inclusion by encouraging participation of all pupils in learning and extracurricular activities.

· Use effective behaviour management strategies consistently in line with the school’s policy and procedures.

· Contribute to effective assessment and planning by supporting the monitoring, recording and reporting of pupil performance and progress as appropriate to the level of the role.

· Communicate effectively and sensitively with pupils to adapt to their needs and support their learning.

· Maintain a stimulating and safe learning environment by organising and managing physical teaching space and resources.

**4. Working with others Teaching assistants are expected to:**

· Recognise and respect the role and contribution of other professionals, parents and carers by liaising effectively and working in partnership with them.

· With the class teacher, keep other professionals accurately informed of performance and progress or concerns they may have about the pupils they work with.

· Understand their responsibility to share knowledge to inform planning and decision making.

· Understand their role in order to be able to work collaboratively with classroom teachers and other colleagues, including specialist advisory teachers.

· Communicate their knowledge and understanding of pupils to other school staff and education, health and social care professionals, so that informed decision making can take place on intervention and provision.

**Administrative manager/team leader – Professional Standards**

An administrative manager or team leader could be expected to:

1. Meet all of the standards for administrative staff
2. Allocate work to team members and check that the work is completed on time and to the required standard
3. Know how to delegate tasks appropriately
4. Lead and motivate the administrative team
5. Undertake the performance management of team members in accordance with school policy and procedures
6. Support and develop team members to increase their competence in the workplace
7. Ensure that all health and safety procedures are followed and that relevant risk assessments are in place
8. Make arrangements to cover the urgent and priority work of any absent colleague to ensure that the work of the team is not disrupted
9. Ensure effective systems are in place for the recording of all equipment and materials used by the administrative team
10. Assume responsibility for stocktaking, regular monitoring of stock levels and ordering of replacement stock in order to ensure that materials and equipment required for the work of the team are always available
11. Arrange for external repairs of equipment when necessary
12. Advise the business manager/bursar, headteacher and governors about relevant matters, such as renewal of contracts for office equipment or services
13. Order new equipment and materials
14. Maintain financial records

**Administrative staff – Professional Standards**

Administrative staff could be expected to:

1. Use IT hardware and relevant software packages efficiently and effectively to access, manage, retrieve and share the various types of information required by the postholder’s specific role
2. Be able to competently use all items of office equipment, such as the photocopier, and keep up to date with developments and changes to such equipment
3. Maintain filing systems, both paper and electronic, efficiently and in accordance with current systems and processes
4. Ensure that documents are prepared and data is entered into IT systems accurately and on time
5. Answer telephones promptly and with a respectful and professional manner
6. Be familiar with all policies and procedures that are relevant for the role
7. Know where to get help and support
8. Know the limits of the role and when to refer people or issues elsewhere
9. Maintain confidentiality at all times
10. Understand his or her role in safeguarding and act on any safeguarding issues in accordance with school procedures
11. Maintain a safe working environment for his or herself and others including the completion of risk assessments
12. Undertake stocktaking and ordering of materials and equipment as required
13. Be able to work collaboratively as part of an office/administrative team
14. Develop positive working relationships with colleagues
15. Communicate clearly, respectfully and professionally with pupils, parents, colleagues and visitors
16. Work with his or her team leader to develop and implement a professional development plan
17. Use feedback and personal reflection to improve his or her own working practices
18. Where relevant, maintain first aid accreditation
19. Understand how the role supports the quality of teaching and learning
20. Understand the roles of external agencies and how to work with them as required
21. Follow all processes for the handling and banking of money meticulously
22. Know, understand and follow all procedures for the management of the school’s finances, if working on financial matters

**Receptionist – Professional Standards**

A receptionist could be expected to:

1. Maintain a clean, tidy and welcoming reception area
2. Supervise the work of pupil receptionists, giving them tasks as appropriate
3. Ensure that visitors are not kept waiting while non-urgent tasks are worked on
4. Greet visitors, staff and pupils professionally and with a welcoming manner
5. Answer telephones within an agreed time and with a respectful and professional manner
6. Know how to respond in an emergency and how to secure assistance quickly
7. Ensure that the visitors book and staff and pupil signing in and out books are always available and are always used
8. Ensure that all visitors calling at reception are issued with visitor badges
9. Be clear about fire evacuation procedures and the processes for checking that all visitors are accounted for in case of fire or fire drill
10. Be familiar with the diary for each day
11. Be clear about how to call for a temporary replacement on reception so that it is not left unattended

**Senior Site Supervisor**

1. To ensure that all contracted work does not extend beyond the agreed timescale.
2. To ensure that all contractors are able to access the site when required to do so at all times.
3. To maintain a day to day site fault log with all school staff.
4. To respond to the fault log daily and ensure that the site is maintained and in line with required Health and Safety Guidelines.
5. To carry out weekly monitoring of the general school site, report issues to Line Manager and address issues within any specified timescales.
6. To ensure that the assistant site manager is provided with a daily job/inspection list and that any work is carried out to an acceptable standard.
7. To provide personalised CPD for the part time assistant site manager to ensure that all work is completed in line with Health and Safety requirements.
8. To ensure that the school never left unsecure at any time.
9. To liaise with the part time assistant site manager to ensure that is carried out and the site is secure at all times.

What Performance Management objectives might look like

for School Meals Supervisory Assistants (SMSAs)?

|  |  |  |
| --- | --- | --- |
| Objectives | Task/Action | Performance Review Outcomes |
| What you need to achieve, linked to school improvement plan. | What you intend to do to achieve your objectives. | What you will use to measure how well you are achieving. |
| Supervision and control of pupils in dining hall. | Organising dinner queue.  Ensuring good behaviour and calm atmosphere.  Encourage pupils to eat.  Ensuring pupils tidy/clear up.  Cleaning up spillages. | Order and disciplined maintained effectively.  Introduce sticker reward scheme for good behaviour.  Lunch eaten well by all pupils.  Dining Hall cleared appropriately after lunch.  Spillages cleared up effectively and in timely manner. |
| Supervision and control of pupils in playground. | Supervision of children during lunch.  Challenging any strangers on site. | Ensure that co-operative play is occurring.  Devising wet play games.  Ensuring inclusive play.  Ensuring children’s safety.  Vigilance of children is maintained and strangers challenged. |
| Working co-operatively as member of SMSAs team. | Good timekeeping and attendance record.  Completion of individual tasks.  Assisting other team members. | Timekeeping and Attendance good.  Tasks undertaken with minimum supervision.  Gives assistance to other team members without being asked. |

What Performance Management might look like for an administrator?

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| --- | --- | --- |
| Objectives | Task/Action | Performance Target |
| What you need to achieve, linked to school improvement plan. | What you intend to do to achieve your objectives. | What you will use to measure how well you are achieving. |
| Ensure accountability in the management of school finances. | Maintaining school’s finance system. | The headteacher and Governing body have correct financial information.  Managing budget information effectively. |
| Ensure school office provides admin support for teaching, learning, and management of resources. | Ensuring smooth running of school office. | Admin team supported and managed to ensure cover and work prioritised.  Admin services provided effectively and any improvements identified.  All requests or enquires dealt with correctly and courteously.  The school has a professional face.  Atmosphere at the school is welcoming to pupils, visitors parents and colleagues. |
| Ensure the school database is accurate and secure for staff and pupils. | Maintaining school database. | Ability to produce accurate and timely data.  Information flow supports teaching and learning. |
| Ensure appropriate admin staff in place to cover office tasks. | Assisting with recruitment. | Admin vacancies filled in accordance with agreed procedures.  Routine events managed with minimal intervention/ supervision. |
| Working co-operatively as member of admin team. | Good timekeeping and attendance record.  Completion of individual tasks  Assisting other team members | Timekeeping and Attendance good.  Tasks undertaken with minimum supervision  Gives assistance to other team members without being asked |

What Performance Management might look like for Welfare/ TA’s?

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| --- | --- | --- |
| Objectives | Task/Action | Performance Target |
| What you need to achieve, linked to school improvement plan. | What you intend to do to achieve your objectives. | What you will use to measure how well you are achieving. |
| Following agreed procedures for sick children / injuries.  Care for distressed pupil. | Fill in injury log or accident report.  Contact parents.  Administer first aid.  Intervene in any disputes with pupils.  Report any incident to teacher if appropriate. | All accidents logged properly.  No complaints from parents.  Pupils do not complain of staff ignoring their complaints. |
| Manage the medical room. | Keep medical room neat and tidy.  Monitor stock. | Medical supplies easily located. |
| Making and assisting with preparation of equipment.  Helping pupils with activity and clearing up.  Assisting small groups with reading or other learning. | Helping teachers to set up.  Helping with displays.  Helping pupils tidy up.  Working with small groups on a task.  Motivate pupils to complete task.  Give assistance as appropriate.  Make notes and observations on pupil progress. | Displays evidence of pupils work increases pupil motivation.  Classroom tidy and safe and attractive environment for learning.  Contribution to learning is evident on teachers’ lesson plans.  Pupils become independent learners.  Pupil achievement rises.  Disruptive behaviour reduced.  Notes are kept on pupil progress and fed into teachers assessment / reports to parents. |