



St. Gregory's Catholic High School

Performance, Review and Development Procedure for Support Staff

Monitoring

The implementation of the policy will be monitored by the Director of Finance and Resources.

Evaluation

The policy was reviewed by the Director of Finance and Resources and Senior Leadership Team on 14th June 2021 prior to the submission of the policy to Governors' Community Committee for scrutiny and recommendation to the Full Governing Body for approval.

Policy Review Dates:

Date last approved by Full Governing Body: New

Date submitted to Governors' Committee: 17th June 2021

Date submitted to Full Governing Body: 13th July 2021

Review Frequency: Annual

Start date for policy review: March 2022

DOCUMENT STATUS

Version	Date	Action
1	April 2016	Initial Draft – agreed at JCC July 2016

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Appendix A – PR&D Form

1. PURPOSE

- 1.1 This policy sets out the framework for a clear and consistent assessment of the overall performance of support staff, and for supporting their personal and professional development within the context of the school's priorities.
- 1.2 In addition to supporting the professional development of support staff, the PR&D procedure may be used to address any initial concerns that are raised about performance. If concerns are such that they cannot be resolved through this PR&D process, then consideration of whether to commence the Managing Employee Performance (Capability) procedure will be made.

2. SCOPE

- 2.2 This policy applies to all non-teaching employees in schools, except those on contracts of less than one term, those who are subject to a six month probationary review period and those who are subject to the Capability Procedure.
- 2.3 Separate arrangements exist for the Appraisal of Teachers.

3. PRINCIPLES

- 3.1 PR&D in this school will be a supportive and developmental process designed to ensure that all employees have the skills and support they need to carry out their role effectively. It will help to ensure that employees are able to continue to improve their professional practice and to develop in their role.
- 3.2 The process is designed to ensure that all employees know precisely what is expected of them in terms of their role at school and the standards they are to work to.
- 3.3. The PR&D process is a two way process and provides the opportunity for the employee and the line manager to set and agree objectives and targets and to identify development needs.
- 3.4 Employees will have their performance reviewed against clear, relevant, achievable and agreed criteria and will understand the process for confirming incremental progression.
- 3.5 Training and development needs will be identified through the PR&D process in order to assist the employee to perform better in their job.

4. CONFIDENTIALITY STATEMENT

- 4.1 All parties involved in this policy will be expected to observe the principle of confidentiality in relation to the contents of PR&Ds and any documentation that arises thereof.

- 4.2 Any documentation arising from any discussions during PR&D meetings may be shared by the Headteacher/line manager with individuals involved in monitoring performance, or those involved in any capability proceedings that may follow and for quality assurance/moderation purposes.
- 4.3 Documentation arising from any discussions during PR&D meetings should be stored securely and not stored, either electronically or manually, in any public areas in school/on the school's computer network.

5. HEALTH & DISABILITY

- 5.1 The line manager should consider any ongoing health issues or disability affecting the employee during the PR&D period, including the possibility of considering whether any reasonable adjustments should be made. The Schools HR Advisory Service and/or Occupational Health Unit can provide advice in this respect if required.

6. THE PR&D TIMETABLE

- 6.1 The PR& D period will run for 12 months, from 1st July to 30th June each year. Employees who are employed on a fixed term contract of less than one year will have their performance managed in accordance with the principles underpinning this policy.
- 6.2 It will be a matter for individual schools to determine at what point during the PR&D period the PR&D meeting will take place although in order for the process to be as successful as possible it should be carried out early in the PR&D period.
- 6.3 At this meeting, performance during the previous PR& D period will be reviewed as will any training and development needs. Performance objectives will also be set for the forthcoming PR&D period. Some performance objectives could be carried forward into the subsequent PR&D period if necessary/appropriate. It may be deemed appropriate at the annual PR&D meeting to set an interim review meeting part-way through the PR&D period. The necessity of this will depend on the nature of the role, the nature of the performance objectives and/or where there are concerns about performance.
- 6.4 The employee will be provided with a copy of Appendix A and their Job Description along with a copy of the pro-forma from the last PR&D period (where possible). The employee will be asked to complete the relevant sections of the pro-forma and return to their line manager prior to the PR&D meeting. Schools may wish to consider making the completion of the pro-forma in advance of the meeting optional and in some cases they may wish to provide some assistance in its completion. The remainder of the pro-forma will be completed during the PR&D meeting. At the end of the meeting a fully signed copy should be provided to the employee and a copy should be

retained by the line manager for reference purposes at the next PR&D meeting and any interim PR&D meetings.

- 6.5 The assessment of performance and of training and development needs will inform the planning process for the following PR&D period.
- 6.6 It will be a matter for individual schools to determine whether or not it will be necessary to hold an interim PR&D meeting part-way through the PR&D period.
- 6.7 Where an employee transfers to a new post within the school part-way through a cycle, the Headteacher shall determine whether the period shall begin again and who will do the assessment.

7. SETTING OBJECTIVES

- 7.1 Objectives will be set before, or as soon as practicable after the start of each PR&D period. The objectives set will be Specific, Measurable, Achievable, Realistic and Time-bound (SMART) and will be appropriate to the employee's role and level of experience.
- 7.2 The line manager and employee will seek to agree the objectives but, if that is not possible, the line manager will determine the objectives. Objectives may be revised if circumstances change. Objectives will be quality assured/moderated across the School to ensure that objectives set are consistent across employees with similar roles, experience and levels of responsibility.
- 7.3 The objectives set for each employee will, if achieved, contribute to the school's priorities, and will include a description of what success may look like, where this is not obvious. The objectives may also take into account the professional aspirations of the employee and their current job description.
- 7.4 The number and depth of targets should be appropriate to the employee, their individual circumstances and role in school.
- 7.5 The PR& D process should include an assessment against the employee's Job Description and a review of the Job Description to ensure it is still relevant.

8. REVIEWING PERFORMANCE

- 8.1 There are a variety of ways to assess the employee's performance and development against the objectives set during the PR&D process. This will depend very much on the following:
 - (i) If the employee has continued to undertake all aspects of their role to a satisfactory standard;
 - (ii) If the employee has undertaken any additional training during the PR&D cycle;

- (iii) If, with the benefit of hindsight, the objectives set at the start of the PR&D period were relevant and if there have been any extenuating circumstances which means that certain objectives could not be met;
- (iv) The role of the employee;
- (v) Feedback from other appropriate staff in school for example feedback from Teachers regarding Teaching Assistants, feedback from Site Supervisors regarding Cleaners and feedback from Schools Business Managers regarding business support staff.

8.2 In situations where the employee's performance becomes a cause for concern, additional review meetings may take place and additional support discussed, to assist the employee in achieving their objectives. During any additional meetings, the line manager will clearly outline the nature of the concerns, so that the employee is fully aware of what is required to achieve their objectives.

9. DEVELOPMENT AND SUPPORT

9.1 PR&D is a supportive process which will be used to inform continuing professional development. The school wishes to encourage a culture in which all employees take responsibility for improving their performance through appropriate professional development. Professional development will be linked to school priorities and to the ongoing professional development needs and priorities of individual employees.

9.3 The school CPD program will be informed by the training and development needs identified as part of the PR&D process. In this regard, the Governing Body will ensure that in budget planning, as far as possible, resources are made available in the school budget for appropriate development opportunities.

9.4 In the case of competing demands on the school budget in relation to CPD opportunities, a decision on relative priority will be taken by the Headteacher with regard to the extent to which:

- (a) the training and support will help the school achieve its priorities; and
- (b) the CPD identified is essential for an employee to meet their objectives.

10. EMPLOYEES ON MATERNITY LEAVE DURING ALL/PART OF THE PR& D PERIOD

10.1 Where an employee is absent from school due to maternity leave, it is unlawful to deny her an PR&D on the grounds of her maternity.

10.2 Schools need to take a practical and flexible approach to conducting PR&Ds where an employee has been absent for some or all of an PR&D period.

- 10.3 Schools should consider conducting an interim PR&D meeting prior to an employee commencing a period of maternity leave, even if this is early in the PR&D year. Schools should not require employees to use Keeping in Touch (KIT) days for the purposes of PR&D.
- 10.4 Schools may also consider conducting an interim review meeting prior to an employee commencing any other pre-planned long-term absence e.g. a period of extended unpaid leave, Adoption Leave, a planned long-term sickness absence.

Performance Review and Development Form

NAME :	MANAGER NAME:
JOB TITLE :	DATE OF PR&D :

PART 2

PERSONAL PERFORMANCE PLAN: (additional sheets can be inserted if required)

Obj Ref	Objective	Action	Target/ Standard	Resources/ Duration	Deadline	Review date and notes
	What needs to be achieved (be SMART) S pecific M easurable A chievable R elevant T imeframed	How it will be achieved	How will you know when the objective has been achieved	What's needed to complete the actions, including time spend	Time scales agreed	This is to be completed at subsequent review meetings

Signed Employee _____

Signed Manager: _____

Date: _____

PART 3

PERSONAL DEVELOPMENT PLAN (additional sheets can be inserted if required)

Obj Ref	Area For Development	Competency Reference	Priority Rating * See Below	How? Resources Required?	When? Who?	Bid/ Commitment	Review Date and Notes
	What area requires development? e.g. managing change	G2	(a)	E.g. Coaching Mentoring Training	When is development required by, and who will take responsibility for ensuring the development is achieved?		

Signed Employee: _____

Signed Manager: _____

Date: _____

***Priority Rating:**

- (a) Under performance (compulsory)
- (b) New requirements/Service requirements (compulsory)
- (c) Career development (optional)
- (d) Personal development – no link with performance plan (optional)

PART 4 – (RECORD OF PROGRESS REVIEW) - LOG

Name of Employee _____ Date _____				
Obj Ref	Action Required	Deadline	Progress/Issues	Agreed Adjustments

Signed Employee: _____

Date: _____

Signed Manager: _____

Date: _____