

**Performance Management Support
Staff Policy**

Erdington Academy

Part of Fairfax Multi-Academy Trust

September 2020

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Ratified By:	Mr Mallett – Head of Academy
Date Ratified:	September 2020
Review Date:	September 2021

Application of the Policy

The policy applies to all support staff employed by Erdington Academy.

Purpose

This policy sets out the framework for a clear and consistent assessment of the overall performance of support staff and for supporting their development needs within the context of the Academy's improvement plan and their own professional needs.

This Academy's performance management policy is designed to raise student achievement and attainment by;

- clearly setting out the roles and responsibilities of all participants
- improving support staffs' morale and motivation
- providing an entitlement for support staff to engage in professional development as identified in the planning meeting
- being seen as enabling
- encouraging the development of confident and professional judgements amongst support staff
- increasing support staffs' participation in decision-making and developing a sense of control over their own work.

Links to School Improvement, School Self Evaluation and School Development Planning

To comply with the requirement to show how the arrangements for performance management link with those for school improvement, school self-evaluation and school development planning, the performance management process will be the main source of information as appropriate for school self-evaluation and the wider school improvement process.

Similarly, the school improvement and development plan and the school's self-evaluation are key documents for the performance management process.

All reviewers are expected to explore the alignment of reviewees' objectives with the Academy's priorities and plans. The objectives should also reflect reviewees' professional aspirations.

Consistency of Treatment and Fairness

The Academy Association is committed to ensuring consistency of treatment and fairness in the operation of performance management.

To ensure this the following provisions are made in relation to moderation, quality assurance and objective setting.

Quality assurance

The Headteacher has determined that he/she will delegate the reviewer role for some or all support staff for which he/she is not the line manager. In these circumstances the Headteacher will moderate a sample of planning statements, with the Deputy Headteacher (Performance Management/CPD), to check that the plans recorded in the statements of support staff at the Academy;

- are consistent between those who have similar experience and similar levels of responsibility;
- comply with the Academy's performance management policy, the regulations and the requirements of equality legislation

The Academy Association will review the quality assurance processes when the performance policy is reviewed.

Objective Setting

The objectives set will be concise, achievable, time-bound, fair and equitable in relation to support staff with similar roles/responsibilities and experience, and will have regard to what can reasonably be expected of any member of staff in that position given the desirability of the reviewee being able to achieve a satisfactory balance between the time required to discharge his professional duties and the time required to pursue his personal interests outside work, consistent with the Academy's strategy for bringing downward pressure on working hours. They shall also take account of the member of staff's professional aspirations and any relevant pay progression criteria. They should be such that, if they are achieved, they will contribute to improving the progress of students at the Academy.

The reviewer and reviewee will seek to agree the objectives but where a joint determination cannot be made the reviewer will make the determination.

In this Academy:

- all members of staff will have up to three objectives

A reviewee's objectives should reflect any relevant team, year or whole Academy objectives.

Though performance management is an assessment of overall performance of support staff, objectives cannot cover the full range of a member of staff's roles/responsibilities. Objectives will, therefore, focus on the priorities for an individual for the cycle. At the review stage it will be assumed that those aspects of a member of staff's roles/responsibilities not covered by the objectives or any amendment to the statement which may have been necessary in accordance with the provisions of the regulations have been carried out satisfactorily.

Reviewing Progress

At the end of the cycle assessment of performance against an objective will be on the basis of the performance criteria set at the beginning of the cycle. The performance management cycle is annual, but on occasions it may be appropriate to set objectives that will cover a period over more than one cycle. In such cases, the basis on which the progress being made towards meeting the performance criteria for the objective will be assessed at the end of the first cycle and will be recorded in the planning and review statement at the beginning of the cycle.

Appeals

At specified points in the performance management process members of staff have a right of appeal against any of the entries in their planning and review statements. Where a reviewee wishes to appeal on the basis of more than one entry this would constitute one appeal hearing. Any appeal needs to be requested via the schools appraisal senior leader.

Confidentiality

The whole performance management process and the statements generated under it, in particular, will be treated with strict confidentiality at all times. Only the reviewee's line manager or, where s/he has more than one, each of her/his line managers will be provided with access to the reviewee's plan recorded in her/his statement, upon request, where this is necessary to enable the line manager to discharge her/his line management responsibilities. Reviewees will be told who has requested and has been granted access. In addition access to the reviewee's plan recorded in his/her statement is granted to the Headteacher and Deputy Headteacher (Performance Management/CPD)

Training and Support

The Academy's CPD programme will be informed by the training and development needs identified in the reviewees' planning and review statements.

The Academy Association will ensure in the budget planning that, as far as possible, appropriate resources are made available in the Academy budget for any training and support agreed for reviewees.

An account of the training and development needs of staff in general, including the instances where it did not prove possible to provide any agreed CPD, will form a part of the Headteacher's annual report to the Academy Association about the operation of the performance management in the Academy.

With regard to the provision of CPD in the case of competing demands on the Academy budget, a decision on relative priority will be taken with regard to the extent to which (a) the CPD identified is essential for a reviewee to meet their objectives and (b) the extent to which the training and support will help the Academy to achieve its priorities. The Academy's priorities will have precedence. Members of staff should not be held accountable for failing to make good progress towards meeting their performance criteria where the support recorded in the planning statement has not been provided.

Appointment of Reviewers for Support Staff

In the case where the Headteacher is not the member of staff's line manager, the Headteacher may delegate the duties imposed upon the reviewer, in their entirety, to the member of staff's line manager. In this Academy the Headteacher has decided that:

The Headteacher will be the reviewer for those members of staff s/he directly line manages and will delegate the role of reviewer, in its entirety, to the relevant line managers for some or all other members of staff.

The maximum number of reviews that any line manager will be expected to undertake per cycle is four.

Where a member of staff has more than one line manager the Headteacher will determine which line manager will be best placed to manage and review the member of staff's performance.

Where a member of staff is of the opinion that the person to whom the Headteacher has delegated the reviewer's duties is unsuitable for professional reasons, s/he may submit a written request to the Headteacher for that reviewer to be replaced, stating those reasons.

Where it becomes apparent that the reviewer will be absent for the majority of the cycle or is unsuitable for professional reasons the Headteacher may perform the duties himself/herself or delegate them in their entirety to another member of staff. Where this member of staff is not the reviewee's line manager the member of staff will have an equivalent or higher status in the staffing structure as the member of staff's line manager.

A performance management cycle will not begin again in the event of the reviewer being changed.

All line managers to whom the Headteacher has delegated the role of reviewer will receive appropriate preparation for that role.

The Performance Management Cycle

The performance of support staff must be reviewed on an annual basis. Performance planning and reviews must be completed for all members of Support Staff by 30th October.

The performance management cycle in this Academy, therefore, will run from 1st September to 31st August.

Support Staff, who are employed on a fixed term contract of less than one year, will have their performance managed in accordance with the principles underpinning the provisions of this policy. The length of the cycle will be determined by the duration of their contract.

Where a member of staff starts their employment at the Academy part-way through a cycle, the Headteacher shall determine the length of the first cycle for that member of staff, with a view to bringing his/her cycle into line with the cycle for other members of staff at the Academy as soon as possible.

Where a member of support staff transfers to a new post within the Academy part-way through a cycle, the Headteacher shall determine whether the cycle shall begin again and whether to change the reviewer.

Retention of Statements

Performance management planning and review statements will be retained for a minimum period of 6 years.

Monitoring and Evaluation

The Headteacher will provide the Academy Association with a written report on the operation of the Academy's performance management policy annually. The report will not contain any information which would enable any individual to be identified. The report will include:

- the operation of the performance management policy;
- the effectiveness of the Academy's performance management procedures;
- training and development needs of support staff

The Academy Association is committed to ensuring that the performance management process is fair and non-discriminatory.

The Headteacher will also report on whether there have been any appeals or representations on an individual or collective basis on the grounds of alleged discrimination under any of the categories above.

Review of the Policy

The Academy Association will review the performance management policy every academic year.

The Academy Association will take account of the Headteacher's report in its review of the performance management policy. The policy will be revised as required to introduce any changes in regulation and statutory guidance to ensure that it is always up to date.

The Academy Association will seek to agree any revisions to the policy with the recognised trade unions having regard to the results of the consultation with all members of staff.

To ensure support staff are fully conversant with the performance management arrangements, all new members of support staff who join the Academy will be briefed on them as part of their introduction to the Academy.

Access to Documentation

Copies of the Academy improvement and development plan and SEF are published on the Academy's intranet.