

Guidance note on performance management and development for school support staff

Introduction

1. Although performance management for support staff in schools is not statutory, it is recommended that schools adopt good practice arrangements for the performance management and development of support staff which benefits both staff and pupils within an effective school.
2. Oxfordshire County Council recognises that regular, structured discussions between line managers and employees are important for managing performance, service quality and maximising the skills and knowledge of employees. It is therefore recommended good practice that all employees should have regular one-to-one meetings irrespective of their role, length of service or whether they are full or part time, permanent, casual or temporary.
3. Headteachers have a duty to ensure that performance management processes are applied fairly and consistently and in accordance with equality and inclusion policies. It is recommended that the school adopts the same procedures for the monitoring and evaluation of the performance management of support staff as for teachers, i.e. the governing body should be responsible for monitoring the operation and outcomes of performance management arrangements and that the headteacher should include the performance management of support staff in his/her annual report to the governing body.

Performance management process

4. The performance management process could start in January with the review in December or September with the review in July.
5. The first one-to-one in the performance management cycle involves planning for the year ahead and would include the following:
 - Objective setting;
 - Establishing standards of performance expected;
 - Agreeing evidence collection;
 - Discussing and agreeing any development needs and support;
 - Agreeing timescales.

6. It is recommended that there would be a **six-monthly one-to-one review meeting**.

This would cover:

- Monitoring of performance;
 - Observation of practice;
 - Evidence collection and sharing;
 - Providing support and feedback;
 - Ongoing support, mentoring, training and development.
7. The **final review stage** would involve:
- Review and assessment of performance using evidence and feedback;
 - A review of the role / responsibilities (if necessary).
8. The line manager and employee would then start planning for the next cycle.

Guidance on one-to-ones

9. The purpose of one-to-one meetings are to
- seek and give guidance, support and direction;
 - share information, ideas and problem solve;
 - ensure employees understand what is expected of them and agree priorities;
 - provide a two-way channel of communication throughout the school;
 - develop the employee's skills, knowledge and capability;
 - allow space for employees to discuss and reflect on their work and share any concerns or challenges they have;
 - agree goals and review progress against these goals;
 - review workload, ways of working and employee wellbeing;
 - recognise and celebrate what is going well and to discuss where improvements can be made.

They should not:

- be rushed or interrupted;
- be one sided;
- be focused on manager's needs;
- be negative or demoralising but seeking to address problems in a positive way;

- break confidentiality (see data protection policy for further details);
- ignore or fail to support the individual with issues raised.

Responsibilities of Managers:

- to prepare for ones-to-ones and identify issues which require attention;
- to ensure that agenda setting is a two-way process;
- to ensure that one-to-ones are recorded and actions agreed;
- to tackle under-performance/conduct issues positively and make links with other processes if needed e.g. Code of Conduct, Disciplinary Procedures;
- in the event of long-term absence of a manager, a replacement manager will be arranged.

Responsibilities of employees:

- to prepare for one-to-ones and identify issues which require attention;
- to ensure that actions which are agreed are carried out and completed;
- to raise issues of concern relating to poor practice (whistle blowing).

Note taking and records

10. Notes should be taken at each stage including any additional one-to-ones. Both the manager and employee should have a copy of the record to refer to.
11. At the end of the planning and review meeting, the reviewer should summarise the points that have been discussed. Both parties should agree the content and wording. The record should be a fair summary of the meeting's discussion.
12. Performance management planning and review documents should be retained in the school for a minimum period of six years.

Confidentiality

13. Performance management records will be maintained in accordance with existing data protection policy.

Review of policy

14. We check our policies regularly to make sure they are up to date; the latest version can be accessed from the intranet.
15. If you have any questions about this policy contact your HR team.

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Annex 1a: SUPPORT STAFF PERFORMANCE MANAGEMENT - Individual Plan

Name of Reviewee: _____ Name of reviewer: _____

Job title: _____ Date of Review: _____

Team: _____

Performance management objectives for the year ahead

Objectives for the coming year	Action steps What tasks will I carry out to achieve this?	Timescale Date by which task will be completed	Success criteria How will I know when this is achieved?
1.			
2.			
3.			

Observation of work (for classroom-based staff)

Class / group / work to be observed	Term in which observation will take place	Focus of observation	Observer

Other sources of evidence for assessing objectives / contributing to overall performance (for both classroom and other support staff)

What / who?	When / where?	Questions to ask?

Reviewer's signature: _____

Date: _____

Reviewee's comments (optional)

Reviewee's signature:

Date:

Annex 1b: SUPPORT STAFF PERFORMANCE MANAGEMENT – Personal Development Plan

Name of Reviewee: _____ Name of Reviewer: _____

Team: _____ Date of Review: _____

Personal and Professional Development Goals	Timescale
1.	
2.	
3.	

Support for required for objectives and development goals

Support can take many forms, examples include observation of the work of a colleague, mentoring by a colleague, external training, internal training, job-shadowing.

Support required for meeting objectives	Timescale
1.	
2.	
3.	
Support required for personal and professional development goals	Timescale
1.	
2.	
3.	

Reviewer's signature: _____ Date: _____

Reviewee's signature: _____ Date: _____

Annex 2: SUPPORT STAFF PERFORMANCE MANAGEMENT - Review Statement

Name of reviewee: _____

Name of Reviewer: _____

Job title: _____

Date of Review: _____

Team: _____

To what extent have individual objectives been achieved?

Objective	Review of objectives including comments to support assessment Please note any factors outside reviewee's control		Assessment (Exceeded, Met, Partly Met, Not Met)
	Interim review – if appropriate	Annual review	
1.			
2.			

3.			
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Other achievements in the last year

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Agreed action(s)

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Reviewer's comments:

Reviewee's comments (optional):

Reviewer's signature: _____ Date: _____

Reviewee's signature: _____ Date: _____