



North

---

**Yorkshire County Council**

Children and Young People's Service

**Workforce Development**

# **Performance Management of Support Staff**

# CONTENTS

<b>1. Introduction</b>	<b>3</b>
<b>2. Benefits</b>	<b>3</b>
<b>3. Performance Management Cycle</b>	<b>4-5</b>
- Planning	
- Monitoring	
- Reviewing	
<b>4. The Review Meeting</b>	<b>5</b>
<b>5. Professional Development</b>	<b>6</b>
<b>6. Recording the Meeting</b>	<b>7</b>
<b>7. Performance Review Preparation</b>	<b>8</b>
<b>8. Planning and Review – Agenda</b>	<b>9</b>
<b>9. Performance Review Statement</b>	<b>10-12</b>
- Statement	
- Objectives	
- CPD Action Plan	

## **Appendix**

**Setting up a Portfolio of Evidence  
Professional Learning Framework for TAs  
Common Core Skills & Knowledge**

## 1. Introduction

Performance management is an entitlement for all staff. It is a process that supports the work of individuals and teams by setting and reviewing objectives within the context of the department and school improvement plans. It also aids staff development, helps to raise standards, ensures good management of people and resources, and promotes continuous improvement for the whole school.

Incremental progression through the pay scales is dependent on satisfactory performance and this will in part be informed by performance review (but also takes into account attendance, conduct and capability)

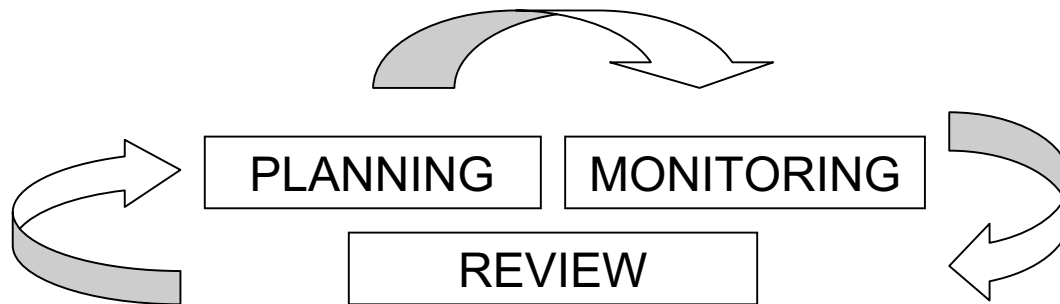
Your school may already have achieved the Investors in People (IIP) standard, or may work towards accreditation in the future. Performance review is a key part of the IIP process.

## 2. Benefits

- Improved two way communication between the line manager and employee
- A clear understanding of roles and responsibilities within the team
- Working towards shared goals, enabling the school to achieve its aims and raise standards
- Appropriate and effective training and development, linked to the achievement of objectives
- Support for work in a continuously changing environment, identifying current and future development needs in line with individual and school goals
- Improved performance and job satisfaction, supporting individuals to work to their full potential, supporting career progression

### 3. The Performance Management Cycle

Performance management is an ongoing cycle involving 3 stages –planning, monitoring and review.



#### Stage 1 - Planning and Preparation

Reviews should occur at least annually and ideally there should be some form of interim review of progress after six months. Normally, the review/planning meeting would take place in late summer or early autumn so that the process can be linked to school development priorities and is in line with teachers' performance management cycle. Performance management is a continuous process, however, and the opportunity to discuss performance at any point during the cycle should exist.

#### Job Description

It is important that a clear, concise job description is in place. There should be agreement between both parties that this is a fair and accurate reflection of what is required. As part of the process, changes to the job description may be recommended.

#### Occupational standards

Occupational standards are statements of competence describing good practice, and are written to measure performance. There are a range of standards to cover most roles in school, for example the NOS for supporting teaching and learning, apply to classroom support staff. ([www.education.gov.uk](http://www.education.gov.uk))

#### Defining Objectives

In order to agree personal objectives, it is important to begin by looking at the school's priorities for development for the forthcoming year. Both parties should then identify how the job role contributes towards the achievement of the school's objectives, as identified in the School Development Plan.

Personal objectives need to be designed to be **SMART**

**Specific Measurable Achievable Realistic Time bound**

Usually between one and three in number, they will help the staff member to focus on particular aspects of their role and how progress will be measured within the forthcoming months.

### **Stage 2 - Monitoring Progress**

The individual and the team leader/supervisor should keep progress under active review throughout the year and discuss any support required. This should mean that there are no sudden surprises about performance introduced in the review meeting.

### **Stage 3 - Review and Planning for the next cycle**

This is a two way discussion between the employee and his/her supervisor, to review past performance and recognise achievements, with the aim of a clear understanding of:

- The main purpose of his/her role
- Common Core Skills and Knowledge and Professional Frameworks / Relevant occupational standards
- Agreement on individual targets/objectives linked to the school's priorities.
- Criteria for measuring success with targets
- Career aspirations
- Learning and development needs

## **4. The Review Meeting**

- Agree well in advance of the time, date and venue for the discussion and the key purpose of the meeting. Make sure that an appropriate place is available to hold the discussion – it should be relaxed, no interruptions, no telephone calls etc..
- Allow sufficient time.
- Performance Review Preparation guidance has been provided to help both parties prepare for the review meeting, and provide a structure for the discussion. Prepare in advance, using the review preparation

document. This is a two-way discussion. Take time to discuss any concerns about the process in advance.

- Consider the main points that you want to bring out in the discussion and identify examples to support your views.
- Listen to the staff member and encourage them to contribute fully to the discussion.
- There should be no surprises – the review meeting is not the appropriate time to drop ‘bombshells’ about unacceptable performance or behavior that should have been dealt with at the time it occurred.
- The particular contribution required of the staff member in the forthcoming year should be linked to school development priorities, if possible. Professional development needed to support the achievement of targets should be agreed and recorded.

## 5. Professional Development

Professional development should be seen as an entitlement. Professional development needs can be met in a variety of ways, including:

- Using the NYCC Learning Zone (<http://learningzone.northyorks.gov.uk>)
- In school mentoring
- Inclusion in a working party
- Work shadowing
- Peer observation
- Visiting other schools and settings
- Recommended reading
- Open / e- learning
- Improving ICT skills
- Shared learning, encouraging staff to feedback course information to colleagues, developing communication skills and confidence
- Cluster meetings - in some areas bursars, PAs and TAs have organised opportunities to meet and share best practice etc

It is a very good idea for teaching assistants to keep a **portfolio of professional development** and this can be used to inform the performance

review. A professional portfolio provides a record of development, enhances self-esteem and supports career development. Reflections on development and training should be a key feature of the portfolio.

## 6. Recording the Meeting

It is important that a record of the discussion is kept and agreed actions from the meeting recorded on the review form. This is a confidential record of the discussion, and there must be a clear understanding of who may have sight of this document. CPD needed to assist with the achievement of objectives and/or career development should be agreed and recorded and copied to the school's CPD coordinator.

The record of review is completed by the line manager following the discussion, and handed to the individual for their comments and signature. A copy of the Performance Review record should be available to:

- The staff member
- The reviewer
- The Head Teacher

**Please remember, the review form is a valuable tool, which should be continually referred to, not filed away until next year's review.**



## PERFORMANCE REVIEW PREPARATION DOCUMENT

**Name:** \_\_\_\_\_

**Job Title:** \_\_\_\_\_

Preparation is an important part of the performance review.

Be prepared to talk about yourself and your job. The following questions will help you to reflect on current work and achievements and identify development areas so that you are prepared for the review meeting. You may also wish to refer to evidence from:

- Job Description
- Aspects of specific work undertaken/ progress on particular targets
- Training
- Teaching and Learning seen through lesson observations (TAs only)
- Professional Portfolio (TAs)
- Career Frameworks/Standards

*We recommend that both the post holder and line manager independently consider the following points prior to the review meeting. Please note that a separate form will be used to record the findings of the review discussion*

---

1. Does the job description reflect your role?
2. What aspects of the role do you enjoy most / like the least?
3. What opportunities have there been to discuss work and action plans?
4. How do you feel that you have performed against your objectives?
5. Were there difficulties which prevented the achievement of your objectives?
6. Review training & development activities undertaken during the review period. How effective have these been?
7. What help or training do you need to carry out your role more effectively?
8. What do you think the main objectives should be for the next year?
9. How would you like your career to develop in the future?

## PLANNING AND REVIEW MEETING - AGENDA

<p><b>Current role</b> Confirm the job description reflects the key responsibilities of the reviewee and is still relevant.</p>	<p><b>Possible questions</b></p> <ul style="list-style-type: none"> <li>? Have your responsibilities changed in the last year?</li> <li>? Have you taken on new roles and responsibilities which are not covered in your current job description?</li> <li>? Which aspects of your work do you enjoy?</li> </ul>
<p><b>Review and evaluation of the past year</b> Review and evaluation of outcomes, successes and achievements of the last review period.</p>	<ul style="list-style-type: none"> <li>? What have you achieved over the last year that you are particularly proud of?</li> <li>? To what extent have your objectives been achieved?</li> <li>? What skills, knowledge, strengths have helped you achieve your objectives?</li> <li>? How do you think this has benefited the pupils and the school?</li> <li>? Are there ways in which you could be using your skills and knowledge more effectively?</li> <li>? Has anything been difficult or disappointing for you this year? What caused these difficulties/disappointments?</li> <li>? How helpful was the support and training you received?</li> </ul>
<p><b>Planning for the year ahead</b> Discuss possible areas for improvement and set objectives</p>	<ul style="list-style-type: none"> <li>? What do you want to achieve in the next year?</li> <li>? Are there any aspects of your work you would like to improve?</li> </ul>
<p><b>Support/training/development</b> Agree a development plan including relevant development activities.</p>	<ul style="list-style-type: none"> <li>? What knowledge and skills do you need to gain?</li> <li>? How will this be useful to you in your work?</li> <li>? What support or training would help you achieve your objectives?</li> </ul>

**CONFIDENTIAL**

**ANNUAL PERFORMANCE REVIEW STATEMENT**

**Note: Attach a copy of last year's performance targets and development plan to complete the evaluation**

**Summary Statement (based on Planning and Review Meeting Agenda)**

**Reviewee Comments (optional)**

<b>PRINT NAME</b>	<b>SIGNED</b>	<b>DATE</b>

**CONFIDENTIAL**

**PERFORMANCE OBJECTIVES**

Name \_\_\_\_\_

Year \_\_\_\_\_

	<b>Objective in line with school priorities</b>	<b>Actions to achieve objective</b>	<b>Support / resources required</b>	<b>How progress will be monitored</b>	<b>Evaluation of progress</b>
1					
2					
3	<b>Personal Objective(s)</b>				

Factors outside the post holder's control which may affect the achievement of these objectives should be noted.

There will be an opportunity to review progress after 6 months or sooner if required.

**PERFORMANCE REVIEW – CPD ACTION PLAN**

Name..... Job title..... Date .....

<b>Learning needs identified</b>	<b>Proposed action</b>	<b>Person responsible</b>	<b>Achievement date</b>	<b>Evaluation of activity</b>

The information contained on this form will be used by the CPD coordinator to assist with the planning of future development activities and training events.