

Title	Support Staff Performance, Development and Career Progression
Associated Policies	<ul style="list-style-type: none"> • Staff Training and Development (TPO/STA/18) • Capability Policy – Support Staff (TPO/STA/34) • Pay Policy (Support Staff) (TPO/STA/08) • Pay Standardisation Agreement • Probationary Policy (TPO/STA/32)

REVIEWED: SEPTEMBER 2021

NEXT REVIEW: SEPTEMBER 2024

1. Policy Statement

- 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 development within the context of the Trust and individual Academies Development Plan, and the standards expected of them.
- 1.2 This policy is to be used for continued professional development and supporting employees through informal performance concerns. Where performance concerns need to be handled formally the Capability policy for Support Staff (TPO/STA/34).
- 1.3 In determining this policy, the Trust has taken into account all relevant legislation and codes of good practice. This policy should also be read in conjunction with the Support Staff Pay Policy.

2. Who does this policy apply to?

- 2.1 This policy applies to all Trust Support Staff, except those on probation where performance will be reviewed under the Probationary Policy (TPO/STA/32). Employees who are employed on a fixed term contract of less than one year will have their performance managed in accordance with the principles of this policy. The length of the period will be determined by the length of the contract.

3. Who is responsible for carrying out this policy?

- 3.1 The implementation and application of this policy will be monitored at Academy level by the Senior Leadership Team and governors of individual Academies and will remain under constant review by Brooke Weston Trust. For the Central Executive Team, the CEO and the Board will monitor the implementation and application of this policy. Brooke Weston Trust will share information relating to support staff Performance, Development and Career Progression with recognised trade unions on an annual basis.
- 3.2 The 'Nominated Officer' as referred to within this policy will usually be the Line Manager.

4. What are the principles behind this policy?

- 4.1 The Trust is committed to ensuring that reviews of Performance, Development and Career Progression will be a supportive and developmental process designed to ensure that all support staff 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 practices.
- 4.2 This policy aims to ensure consistency and fairness in Performance, Development and Career Progression procedures across the Trust.
- 4.3 As outlined in the Pay Policy, all support staff will automatically progress through the pay band (one increment as a time) annually until they reach the top of the pay band. However, the Trust reserves the right to suspend their annual incremental pay award if on a formal capability plan (see Capability Policy).
- 4.4 The Trust aims to deal with performance matters sensitively and with due respect for the privacy of any individuals involved.

5. The Performance, Development and Career Progression review period

- 5.1 The review period will run for 12 months from 1st September to 31st August
- 5.2 The timescales for Personal Development Discussions (PDD):
 - First meeting to review progress against objectives for the previous academic year to be held by 31 October. At this meeting, objectives will also be agreed for the next 12 months
 - Review meeting to be held by 31 March to identify progress against objectives and any further support required
- 5.3 Support staff who are employed on a fixed term contract of less than one year will have their performance reviewed in accordance with the principles of this policy. The length of the period will be determined and agreed by the length of the contract.
- 5.4 Where an employee starts their employment part-way through a cycle, the nominated officer shall, in discussion with the employee, determine the length of the first cycle for that employee, with a view to bringing their cycle into line with the cycle for other employees as soon as possible.
- 5.5 Where an employee transfers to a new post part-way through a cycle, the nominated officer shall, in discussion with the employee, determine whether the cycle shall begin again and whether to change the appraiser and review the objectives.

Appointing Personal Development Discussion Leads

- 5.6 The Personal Development Discussion for the Central Executive Team will be led by the CEO.
- 5.7 The Principal of an Academy will determine who lead Personal Development Discussions for other members of staff covered by this policy. It is expected that line managers will assume the role in most circumstances. If a member of staff has concerns about their Personal Development Discussion lead, they should approach their Principal directly and, if appropriate, an alternative will be identified. Personal Development Discussion leads will receive annual training in the policy and procedures for Performance, Development and Career Progression and Capability, as well as in conducting an effective Personal Development Discussion.
- 5.8 Where an employee is accountable to two managers, then both managers will feed into the discussion to ensure the employee is given appropriate and accurate feedback.

The Personal Development Discussion (PDD)

- 5.9 By 31 October, the PDD Lead and the employee should meet for the Personal Development Discussion to discuss personal and professional goals, CPD and other arrangements for the appraisal period. The PDD Form (See Appendix 1) should be used to record the conversation.
The Personal Development Discussion will be a supportive process and the employee should be able to:
 - Show how they have demonstrated the BWT Core Values
 - Set Personal Goals for the year ahead with consideration given to the School Development Plan
 - Discuss what professional development has been undertaken and look ahead to any areas of CPD focus for the forthcoming year
 - Have a supportive and positive dialogue with their manager about how their year has gone
- 5.10 All meetings will take place within work hours, and not at lunchtime.
- 5.11 Employees will receive a completed PDD Form within ten working days following the PDD Meeting. They will have the opportunity to respond in writing.
The report will include:
 - Details of the employee's agreed goals for the Performance, Development and Career Progression period in question
 - An assessment of the employee's performance of their role and the responsibilities against their previous goals and their Job Description
 - An assessment of their training and development needs and the identification of action that should be taken to address them. This assessment will inform the planning process for the forthcoming Personal Development and Career Progression period
 - A recommendation on pay where that is relevant for Executive Central Team members

Setting Goals and Objectives

- 5.12 The performance objectives of the Central Executive Team will be set by the CEO.
- 5.13 During the Personal Development Discussion individual and team goals will be discussed with each Support Staff colleague. The objectives should focus on three main areas;
- Whole school target
 - Departmental target
 - An individual CPD target
- 5.14 Goals should be agreed by both parties in the Personal Development Discussion. Goals may be revised by mutual agreement during the personal development discussion period if circumstances change. Where for any reason goals cannot be agreed and are imposed, this will be recorded and provided to both parties, including the reasons for any disagreement.

Absences

- 5.15 Sickness absence and “family-friendly” leave should not have a negative impact on an employee’s performance management. Employees on family-friendly leave will be assessed against their goals before the start of the leave and again when they return to work. This might include information from the most recent Performance, Development and Career Progression review period or any part of the period when the employee was at work.

6. Reviewing Performance, Development and Career Progression

- 6.1 Each employee should have an up to date Job Description on file which documents the expectations of their role, and the standards against which they are assessed.
- 6.2 The Trust undertakes to consider all relevant evidence to arrive at a fair and objective assessment of a colleague’s personal performance and development over time. This is to ensure all support staff receive the levels of support they should rightly expect, to maintain high standards of professional practice.
- 6.3 When reviewing performance, a range of evidence will be used to establish a fair, balanced and objective picture which can be used productively to assist the support staff colleague in setting new personal goals.
- 6.4 Good progress towards the achievement of a challenging goal, even if the performance criteria have not been met in full, will always be considered in a positive light. The culture should be one of recognising progress not one of met/not met assessment. Personal Performance Discussion leads will be trained on this point.

7. Feedback

- 7.1 Support staff colleagues will receive constructive feedback on their performance throughout the year in regular meetings with their line manager. Any concerns of underperformance should be highlighted as they arise rather than waiting for the annual Personal Development Discussion.
- 7.2 The Personal Development Discussion is the end point of the annual process and will take place in the autumn term. In this meeting, the Personal Development Discussion lead will:
- Review the previous year
 - Consider performance against the job description and against the goals for the preceding period
 - Discuss the employee’s professional development needs and identify actions that should be taken
 - Discuss the employee’s wellbeing and any difficulties they may need help with
 - Discuss the employee’s career goals and how they can be assisted towards them

8. Concerns About Performance – Informal Stage

- 8.1 Where concerns arise during the performance period these should be addressed as a matter of urgency for the benefit of all concerned. They should not be left unaddressed until the annual Personal Development Discussion. Whenever such a concern arises a meeting should be held, the purpose of which is:
- To give clear feedback about the nature of the concerns
 - Give the employee an opportunity to comment and respond

- Clarify expectations of performance in line with the job description
- Agree any support required e.g. coaching, mentoring, a six- week support plan
- Clarify how and when progress against the plan will be reviewed
- If appropriate, agree revised goals (and the timescale for progress against these goals to occur)
- Explain the implications if insufficient progress or improvement is made

9. Transition to Capability

- 9.1 When progress is reviewed, if the line manager is not satisfied there has been sufficient progress, the employee will be invited to a formal meeting with the Principal, where they are entitled to be accompanied by a workplace colleague or Trade Union representative. At this meeting the Principal will consider the evidence and the employee may be advised that their performance will be managed under the Capability Policy and the employee will be invited to a formal Capability meeting.
- 9.2 If the Principal does not deem there to be sufficient evidence to move to transition to the capability meeting it may be that the management of the employee's performance remains under the Support Staff Performance, Development and Career Progression Policy.

10. Review of Decision

- 10.1 If an employee wishes to have a review of any decision that affects their Performance, Development and Career Progression outcomes and/or their pay they shall, within 5 working days of being given the written statement of the assessment, make a written request to the decision maker seeking a review.
- 10.2 The statement provided by the employee must indicate the reason(s) why they disagree with the recommendation, and must fall within one or more of the following:
- That the recommendation:
- Incorrectly applied any provision of the appropriate salary and/or personal development discussion policy
 - Failed to have proper regard for statutory provision
 - Failed to take proper account of relevant evidence
 - Took account of irrelevant or inaccurate evidence
 - Was biased; or
 - Otherwise unlawfully discriminated against the employee
- 10.3 The process for a review is set out in Section 9 of the Pay Policy.

11. Policy Review

- 11.1 This policy will be monitored as part of the Academy's annual internal review and reviewed on a three-year cycle or as required by legislature changes. Any significant changes to this policy will be consulted on with Trade Unions.

Employee's Name		Job Title		Date for Mid-Year Review	
Discussion Lead's Name		Review Period		Date for End of Year Review	

Section 1: Core Values Document some of the ways in which you have consistently demonstrated the BWT core values: **Ambition For All, High Expectations, Excellent Teaching & Support, Working Together, Contribute to Society** and think about how you are having a school or Trust wide impact. Please refer to the Behaviours overleaf for some additional information.

Section 2: Personal Goals Please list goals for the review period. Once the period is concluded identify what action you took and provide an initial reflection against each goal with evidence of your impact, looking at what went well and making suggestions for any areas of improvement.

	Goal	Mid-Year Reflection	Date:	End of Year Reflection	Date:	Evidence of Impact and Achievement
1						
2						
3						

Section 3: Professional Development	Document some of the CPD opportunities you have accessed over the previous year. These should include personal CPD such as shadowing colleagues or accessing webinars / training; School wide CPD provided on training days; or even access to pay for qualifications. Also consider what future support you may like to access, any training requirements, or coaching and mentoring
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CPD I have accessed this year	Future CPD I would like to access if possible

Section 4: Mid-Year Review Comments	DATE:	An opportunity for both you and your Personal Development Discussion Lead to add any comments at the mid-year review point.
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Employees Comments	Discussion Leads Comments

Section 5: End of Year Comments	An opportunity for both you and your Personal Development Discussion Lead to add a reflection statement on the previous year.
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Employees Comments	Discussion Leads Comments

Employee's Signature:

Date:

Discussion Lead's Signature:

Date:

**AMBITION
FOR ALL**



**HIGH
EXPECTATIONS**



**EXCELLENT
TEACHING
& SUPPORT**



**WORKING
TOGETHER**



**CONTRIBUTE
TO SOCIETY**

- A resolute determination to succeed and to help students succeed, whatever the obstacles.
- Bringing passion, energy and positivity to any task.
- Celebrating personal success and being proud of the achievements of colleagues and students.
- Supporting colleagues and, especially, close team members
- Seeking out new opportunities and approaches to challenges and turning them into effective actions.
- Always using initiative to help make improvements in how things are done

- Absolute professionalism and commitment to go the extra mile
- Living up to the faith and trust of others (colleagues and students)
- Delivering on targets set and helping others to do the same (colleagues and students)
- Accepting accountability for decisions
- Creating solutions and encouraging innovation
- Embracing change and contribute to making it work
- Willingness and courage to challenge others where standards or practice are not good enough for our own children

- Ensuring everything we do is good enough for our own children.
- Share good practice – in classrooms, in the office, in catering, in cleaning...
- Commitment to be the best we can and to continue to improve the standards in our area of work, whatever our role.
- Be a source of inspiration and encouragement for students at all times.
- Remind colleagues that we all choose to work in schools because we want to have a positive impact on young people’s life chances. This is why we are here.

- Supporting colleagues in our own school and in cross-trust working at all times.
- Offer and accept help; listen to and learn from other colleagues.
- Share information, knowledge and resources with colleagues because working together we can do more, better.
- Participate in and encourage teamwork.
- Join in with trust opportunities as well as school-based events.
- Really understand the needs of colleagues, students and the communities where we work.
- Always treat others with fairness and respect.

- Understand and celebrate the ways in which we are making a difference in the local community.
- Be role models for our students and each other; use our power to give continuous positive examples in everything we do.
- Champion and support diversity, inclusion and tolerance. Challenge behaviours that undermine these values.
- Engage in extracurricular activity and assist at special events for your school, cluster or the Trust.