



Putting Children and Young People First

**Sandwell
Performance
Development (PD)
of School Support
Staff/Non-Teachi
ng Staff Policy
*June 2009***



West Midlands
National Training Awards 2007



Sandwell
Metropolitan Borough Council

Children & Young People's Services

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Introduction

The Support Staff PD policy is designed to help both the school and its employees achieve priorities and targets.

It is specifically designed to enable all support staff to meet their performance demands by ensuring they receive the necessary training and development required for the tasks ahead.

The scheme is a reflective process enabling line managers and support staff to look back at past performance and at the same time look forward to new PD objectives. The needs of the employee to meet those objectives in terms of personal learning and development required to support their attainment, are an essential aspect of the process.

Relevance to School Aims

This policy contributes to the School Aims relating to:

- valuing staff and their contribution to school improvement;
- developing a positive attitude in all members of the staff;
- encouraging all staff to take responsibility for their actions;
- providing a range of opportunities for staff;
- striving for continuous improvement in all we do.

Application of the Policy

The policy applies to school based employees (support staff) other than teachers employed by the school. In this school, this will apply to the following groups of staff: (please insert staff groups below i.e. Learning Support, Admin and clerical etc)

- Teaching Assistants including PE coaches
- ***Business and Administration***
- ***Site including ICT***
- ***Mid-day Supervisors***

Purpose

This policy sets out the framework for a clear and consistent process to develop the overall performance of support staff and for supporting their needs within the context of the School Improvement Plan and their own professional needs.

The PD policy will:

- provide a common and understandable structure for managing and developing support staff within the school in relation to set objectives and support;
- give an opportunity to agree and review individual performance and objectives;
- enable the formulation and review of an individual's training and development plan to help them achieve objectives;
- create a better managed and more effective workforce that delivers improved quality by identifying and addressing issues or barriers, which impede progress;
- give individual employees the opportunity to identify career development opportunities and talk with their manager about their aspirations.

Consistency of Treatment and Fairness

The Governors are committed to ensuring consistency of treatment and fairness in the operation of PD. To ensure this, provisions in the PD are made in relation to moderation, quality assurance and objective setting

Responsibility

The Head Teacher will provide Governors with an annual report in relation to the PD within school. Support staff will play an active role in their own PD, including taking actions agreed at planning and review meetings.

The Head Teacher will have responsibility for the policy and implementation of the support staff PD process.

The Head Teacher will delegate, where appropriate the responsibility for the PD process to the appropriate line manager within school in accordance with the school staffing structure, which is an appendix to the school's pay policy.

Consideration will be given to the workload of line managers in relation to the number of staff they are required to PD in any one cycle.

Head Teachers must ensure that all support staff receive training for PD. Line managers must receive appropriate training and preparation for this role.

The PD Cycle

The PD cycle will be an annual one. Support staff will have a PD meeting with their line managers on an annual basis. The cycle will be completed by the end of the Summer Term annually in order to inform school improvement and budget planning.

Employees subject to a probationary period are not included within this policy.

This process should not be used in cases where support staff are subject to procedures relating to unsatisfactory performance.

Setting Objectives

Appropriate objectives in relation to the member of support staff's job description will be set at the planning and review meeting. Objectives should be achievable and proportionate to the contracted working hours. A maximum of three objectives can be set.

At the end of the cycle, the review of performance against an objective will be on the basis of the performance criteria set at the beginning of the cycle. Good progress towards the achievement of a challenging objective, even if the performance criteria have not been met in full, will be reviewed favourably.

Preparation for the meeting

1. Date and time for the meeting

The line manager will agree with the support staff member a suitable date and time for the planning and review meeting. At least ten working days' notice is required. All meetings must take place within the contracted working hours of the line manager and the member of support staff.

2. Documentation

Documentation should be available in advance of the meeting to allow both parties to prepare thoroughly, these include:

- preparation form – Appendix 1;
- relevant school improvement plans;
- support staff job description;
- CPD budget and policy;
- relevant team or departmental plans;
- planning and review statement – Appendix 2;
- performance development staff guidance – Appendix 3 Line Managers and Appendix 4 Staff;

- relevant professional standards – where appropriate- please see www.tda.gov.uk.

The only document that will be retained in the support staff's personnel file is the planning and review statement. Other documents should be used only to support the discussion.

3. PD Planning and Review document

This document should be completed during the planning and review meeting or no later than five working days later. This should be signed by the line managers and the support staff. Both parties should seek to agree with the contents of the planning and review statement. However, if agreement cannot be made, the line manager will have the final decision. In this circumstance this must be recorded on the planning and review statement.

Following the planning and review meeting, a copy of the signed documentation should be given to the support staff member to retain and a copy given to the Head Teacher. Within ten working days of receiving the planning statement, if the Head Teacher has any concerns in relation to the planning statement they must raise these with the line manager. A further meeting between the line manager and the member of support staff to review the statement may then be required.

A copy of the training and development annex will be given to the school's CPD leader.

4. Job description

Review of performance can only be within the context of the support staff current job description. Any changes to job descriptions cannot be made during the planning and review meeting.

Appeals

Should a member of the support staff be dissatisfied with any part of the performance development process, they should follow the school's grievance procedure. Where a support staff member wishes to raise more than one concern this would constitute one grievance.

Confidentiality

The whole PD process and, in particular, the documentation generated under it, will be treated with strict confidentiality at all times. Only the line manager (or, if appropriate - s/he has more than one, each of her/his line managers) and the Head teacher (or the person to whom s/he delegates responsibility for support staff PD) will have access to it. It will be retained by the Head Teacher.

Training and Support

The school's CPD programme will be partly informed by the training and development needs identified in the training section of the support staff PD review document (Appendix 2).

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

The Head Teacher's annual report to the Governors about the operation of PD in the school will include a summary in relation to the training and development needs of all staff, including instances where it did not prove possible to provide any agreed CPD.

With regard to the provision of CPD in the case of competing demands on the school budget, a decision on relative priority will be taken:

1. Job related training designed to equip employees to undertake their current job
2. Initiatives designed to develop new skills and knowledge, relating to either their current role or expanding scope for progression

The school's priorities will have precedence.

Where the support recorded in the PD planning document has not been provided, this should be taken into account at the review meeting and consideration given to whether this should be carried forward into the following year's cycle.

Retention of PD Documentation

PD documentation will be retained within the support staff's personnel file held by the Head Teacher, while the employee remains in employment at the school and, after leaving the school's employ, it will be stored in the archive files for a minimum period of six years. Data protection legislation will be adhered to.

Monitoring and Evaluation

The Governors will monitor the operation and outcomes of PD arrangements. The Head teacher will provide them with a written report on the operation of the school's PD policy annually. The report will not contain any information that would enable any individual to be identified. The report will include:

- the operation of the PD policy;
- the effectiveness of the school's PD procedures;
- staff training and development needs.

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The Governors are committed to ensuring that the PD process is fair and non-discriminatory and the following monitoring data should be included in the Head teacher's report because they represent the possible grounds for unlawful discrimination:

- Race/gender/disability/age/part-time contracts/trade union membership.

The Head Teacher 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 Governors will review the Support Staff PD Policy each academic year or sooner if changes in legislation warrant it. They will take account of the Head Teacher's report in their review of the policy. Any changes made to this policy will be subject to consultation and agreement with the recognised trade unions.

The school's employee induction process must include the PD arrangements to ensure that support staff are fully conversant with the policy.

Access to Documentation

Support Staff may request copies of their PD documentation from the Head Teacher.

Policy adopted by the Governing Body of _____ School
Date: _____

Preparation Form

Completion of this form is voluntary and should be used to you support you in planning for your PD meeting. This form should not be given to your line manager or be retained in the PD documentation.

Name of support staff:

Date:

1. What has helped or got in the way of you achieving your objectives?
2. How have your achievements been recognised, praised and supported by your line manager and the school / organisation in the last year?
3. What aspects of this performance development cycle need to be carried forward?
4. Have you received the learning and development agreed by yourself and your line manager at the last review/planning meeting?
5. What training and development has been the most effective for you this last year?
6. How do you feel that your skills have improved this year as a result of training and development?

List your successes and those things that you are still concerned about.

Successes	Concerns