



Support Staff Performance Review Policy

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Author Initials	SW
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(This policy supersedes all previous support staff appraisal policies)

CONTRACTUAL POLICY

Union Consultation

Date	Action (meeting, email etc)	Comments	Attendance
			UNISON, GMB, NASUWT, ATL, NUT

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1. Principles

- 1.1 All support staff, those aligned to a specific school and those who are part of ESW Shared Services, have an annual review to evaluate performance, and to provide the basis to sustain and continue the development of each member of staff.
- 1.2 In accordance with support staff NJC employment contracts, pay progression within each band on a salary spine is not dependent on performance, but is service driven on the anniversary of 1 April. The exception to service-related pay progression arises if a member of staff is subject to a capability review in accordance with the ESW Capability Policy.

2. Practice

- 2.1 The appraisal period runs for 12 months from 1st September to 31st August. This review period coincides with the cycle of reporting and planning for the schools and the trust as a whole.
- 2.2 Reviews are completed by the end October half term. Copies are retained on the personnel file.
- 2.3 The reviewer for each member of support staff is the manager or team leader who directly line manages the reviewee. If the line manager is not the ultimate manager (the senior manager) of the department in which the reviewee works, the senior manager may elect to participate directly in the review.
- 2.4 The format of the review is aligned to three groups within the support staff of the Trust:
 - (a) Managers and Team Leaders
 - (b) Administration Staff
 - (c) Operations Staff

2.5 The groups above include :

Senior Managers & Senior Team Leaders
SENCO (if non teacher contract)
Shared Services Senior Managers
Assistant Managers, Sub Team Leaders, Administration Staff, Education Support Staff
Technicians (Science, Tech, Arts)
Pastoral and curriculum support staff
Teaching Assistants
Administration team leaders (Non shared services)
Administrators (Non shared services)
Personal Assistants
Cover supervisors
Shared Services Assistant Managers
Shared Services team members : Finance, IT, Data, Risk, Business Development
Kitchen Supervisors/Team leaders
Site Supervisors
Cleaning Supervisors
Operations Staff
Caretakers
Cleaning Staff
Catering staff

2.6

ESW is committed to ensuring that the performance review process is fair and non-discriminatory. If a member of staff believes that the performance review has not met this standard, they are able to raise their concerns to the Head of the school for school- managed staff or to the Trust Business Manager for all staff managed as part of Shared Services.

2.7 **Review Format – Senior Managers and Team Leaders**

2.7.1 The format for this group is the Performance Review Proforma C.

2.7.2 A senior manager/team leader is responsible for the delivery of a department/team annual action plan, as well as ensuring their own individual holistic performance.

2.7.3 The format of the action plan is included as an appendix to Proforma C. The annual action plan, for the period 1st September to 31st August must be agreed with the line manager (the reviewer) within 15 working days of 1st September.

- 2.7.4 In advance of the review meeting, the reviewer and the reviewee have evaluated progress with respect to the delivery of each item on the department/team annual action plan, and awarded each item a RAG status as of 31st August.
- 2.7.5 The reviewer completes Proforma C. The review format contains two sections
- a) A commentary on the annual team/department action plan
 - b) An individual review of the reviewee.
- 2.7.6 The commentary on the annual team/department action plan will evaluate the status of the annual plan, considering the RAG status of each item, identifying the areas which went well (www) and the areas where the outcome could have been improved, and how (even better if, “ebi”).
- 2.7.7 The individual review section of the report is a summary derived from the line manager’s continual review and monitoring of the reviewee during the year. This section follows the same www and ebi format, encompassing the totality of the reviewee’s individual performance during the year, including the standard operational and people management, and performance in delivering the annual action plan.
- 2.7.8 The review is sent to the reviewee 5 working days before the review meeting; an alternative time frame can be agreed by the reviewer and reviewee.
- 2.7.9 The review meeting is led by the reviewer, highlighting salient areas of the review where discussion ensures that the reviewee understands successes and is also guided with respect to how the “ebi”s can be improved. This is also an opportunity for the reviewee to comment on the content of the report, and in agreement with the reviewer, make amendments if appropriate. In accordance with the Principles (section 1) underpinning this policy, the outcome of the meeting is a mutual understanding of how performance and methods can be adjusted (where necessary) to ensure that the reviewee’s performance is sustained and/or developed.
- 2.8 Review Format – Assistant Managers, Sub Team Leaders, Administration Staff, Education Support Staff**
- 2.8.1 The format for this group is the Performance Review Proforma A.
- 2.8.2 In advance of the review meeting and allowing at least 5 working days, at the request of the reviewer the reviewee completes the first section of the performance review, self-evaluating what went well (www) during the review period and what areas could have been improved/or where the reviewee is seeking support (even better ifs, ebi).
- 2.8.3 On receipt of the self-evaluation, the reviewer completes the performance review in the final section of the report. This individual review section of the report is a summary derived from the line manager’s continual review and monitoring of the reviewee during the year combined with commentary on the reviewee’s self-evaluation. This section

follows the www and ebi format, encompassing the totality of the reviewee's individual performance during the year.

- 2.8.4 The completed review is sent to the reviewee 5 working days before the review meeting; an alternative time frame can be agreed by the reviewer and reviewee.
- 2.8.5 The review meeting is led by the reviewer, highlighting salient areas of the review where discussion ensures that the reviewee understands successes and is also guided with respect to how the "ebi"s can be improved. This is also an opportunity for the reviewee to comment on the content of the report, and in agreement with the reviewer, make amendments if deemed appropriate by the reviewer. In accordance with the Principles (section 1) underpinning this policy, the outcome of the meeting is a mutual understanding of how performance and methods can be adjusted (where necessary) to ensure that the reviewees performance is sustained and/or developed.

2.9 Review Format – Operations Staff

- 2.9.1 The format for this group is the Performance Review Proforma B.
- 2.9.2 The reviewer completes Proforma B in advance of the review meeting to grade the performance of the reviewee and identify actions where necessary to improve the grading in the following review period.
- 2.9.3 The reviewer requests the reviewee's attendance at a review meeting, giving at least 5 working days' notice; an alternative time frame can be agreed by the reviewer and reviewee.
- 2.9.4 The review meeting is led by the reviewer, highlighting salient areas of the review where discussion ensures that the reviewee understands successes and is also guided with respect to actions which need to be taken to address unsatisfactory performance or improve on current levels of performance. This is also an opportunity for the reviewee to comment on the content of the report, and in agreement with the reviewer, make amendments if deemed appropriate by the reviewer. In accordance with the Principles (section 1) underpinning this policy, the outcome of the meeting is a mutual understanding of how performance and methods can be adjusted (where necessary) to ensure that the reviewees performance is sustained and/or developed.

3. Confidentiality

The performance review process and the statements generated under it are treated with confidentiality and are made known only to those with a professional need to be informed: the line manager, senior leaders, school head teachers, shared services managers and the trust business manager.

- 4. This policy is reviewed every three years.

**PERFORMANCE REVIEW (PROFORMA A) – ASSISTANT MANAGERS,
SUB TEAM LEADERS, ADMINISTRATION AND EDUCATION SUPPORT STAFF**

REVIEWEE:	ROLE:
REVIEWER:	DEPARTMENT:
PERIOD REVIEWED:	
WWW (what went well) Reviewee completes the box below, self-assessing by listing in bullet points, achievements and successes	
EBI (even better if) Reviewee completes the box below, self-assessing by listing in bullet points, areas which could be improved, and how they will be improved.	

REVIEWER: EVALUATION OF WWW AND EBI

(Reviewer evaluates manager/team leader performance based on continual senior management review and monitoring throughout the year. The report summarises this assessment, highlighting www (what went well) and ebi (even better ifs).)

REVIEWEE SIGNATURE:**DATE:****REVIEWER SIGNATURE:****DATE:**

PERFORMANCE REVIEW (PROFORMA B) – OPERATIONS

REVIEWEE:	ROLE:
REVIEWER:	DEPARTMENT:
PERIOD REVIEWED:	

	GRADING : A – EXCELLENT B – GOOD C – AVERAGE D - UNSATISFACTORY	ACTION REQUIRED TO IMPROVE ASSESSMENT
QUALITY OF WORK		
WORK RATE		
ATTENDANCE		
TIME KEEPING		
TEAM WORK/INTER PERSONAL SKILLS		
CUSTOMER SERVICE		

REVIEWEE SIGNATURE:	DATE:
REVIEWER SIGNATURE:	DATE:

PERFORMANCE REVIEW (PROFORMA C) – SENIOR MANAGERS & SENIOR TEAM LEADERS

REVIEWEE:	ROLE:
REVIEWER:	DEPARTMENT:
PERIOD REVIEWED:	
REVIEWERS REPORT The commentary on the annual team/department action plan will evaluate the status of the annual plan, considering the RAG status of each item, identifying the areas which went well (www) and the areas where the outcome could have been improved, and how (even better if, “ebi”).	
COMMENTARY ON ANNUAL DEPARTMENT ACTION PLAN	

INDIVIDUAL REVIEW

The individual review section of the report is a summary derived from the line manager's continual review and monitoring of the reviewee during the year. This section follows the same www and ebi format, encompassing the totality of the reviewees' individual performance during the year, including the standard operational and people management, and performance in delivering the annual action plan.

REVIEWEE SIGNATURE:**DATE:****REVIEWER SIGNATURE:****DATE:**

SUPPORT TEAM/DEPARTMENT ANNUAL ACTION PLAN
DEPARTMENT/TEAM NAME :

ACTION	ACTION DESCRIPTION	PLANNED OUTCOME/IMPACT	EVALUATION OF OUTCOME/IMPACT	RAG RATING
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				