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Support Staff Performance and Development Review (PDR) (LLT)



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1. Introduction

In order to achieve its vision and aims, Lydiate Learning Trust recognises the importance that each individual member of staff plays in the provision of excellent quality education for our students. The Trust is committed to making available to all staff high quality performance appraisal which will provide an opportunity for review, reflection, the celebration of success and through professional development and training opportunities assist staff in working to a high standard and achieving their full potential.

▪ **Assessment of Performance**

This policy sets out the framework for a clear and consistent appraisal of employee performance, designed to contribute to the overall effectiveness of the Trust and the quality of teaching and learning for students. It is intended that the Performance and Development Review (PDR) discussion provides an opportunity for reflection, review, and the celebration of success and an assessment of performance and behaviours. It is a forum for the identification of training and development needs and it provides a means of linking these into the Trust training and development plan.

▪ **Cycle for Performance and Development Review**

The process for review and objective setting will link to the academic cycle of the Trust. The PDR meetings will take place in the autumn term and there should be a planned mid-year review.

▪ **Commitment to Professional Development and Training**

Professional development and training requires the commitment of the Trust and the employee. The Trust is committed to providing appropriate and reasonable resources and opportunities to enable the professional development and training of all staff. It is expected that staff will engage seriously with the development and training opportunities provided. This may be delivered through coaching, mentoring, team meetings, network meetings, training events, on the job training, professional studies and e-learning. Wherever possible these activities will be within normal contracted working hours and where staff are requested to attend training during non-contracted time, such hours will be paid. As much notice as possible will be given for any activities which are outside of the normal working day. The Trust will ensure that employee's personal circumstances are taken into consideration.

2. The Purpose and Benefits of Performance and Development Review

The purpose of the PDR system is to improve the performance of staff within the Trust. This involves:

- Reviewing past performance in relation to;
 - Principal areas of accountability (ie key responsibilities/Job Description)
 - Commitment and demonstration of LLT values
 - Previous objectives
- Identifying obstacles that may be affecting performance
- Setting future objectives, both personal and operational
- Identifying, agreeing and planning training and development needs

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- Agreeing a plan of action for the future

The Performance and Development Review discussion enables the employee to:

- Gain a clear picture of what is expected of them
- Discuss priorities and be given clear direction
- Discuss their strengths and weaknesses and to receive feedback on their performance
- Be heard and respected
- Be offered constructive guidance on attaining agreed objectives
- Discuss their future professional development and training needs
- Identify any areas of difficulty and learn from past experiences

The Manager conducting the Performance and Development Review will:

- Gain greater insight into the way the employee works and performs
- Gain greater understanding of the jobholder's potential, needs, strengths and weaknesses
- Have an opportunity to celebrate success and motivate them for the future
- Use the opportunity to develop staff by agreeing future objectives
- Identify training and development needs, particularly for those in new or changing circumstances
- Develop a consistent approach to guidance and encouragement

The Trust will:

- Benefit from improved communication with staff and improved efficiency
- Have an increased ability to assess staffing needs and enhance the development of staff
- Be able to plan and co-ordinate staff training needs
- Have a more accurate assessment of individual potential
- Benefit from an increasingly professional and competent workforce

3. Performance and Development Review Cycle and Meetings

The PDR cycle will run from September to the end of August for each academic year and the annual PDR process should be complete by end November.

A mid-year review should be conducted around March/April, to enable an interview review of progress to date.

4. Preparing for the Performance and Development Review Meeting

4.1. Identification of the Manager

Employees will be appraised annually by their Line Manager, taking into account the need for the individual to have an understanding of the employee's duties and responsibilities.

4.2 Preparing for the Meeting

Manager Preparation:

The Manager should prepare by ensuring that they have a copy of the following documents:

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- Job description
- Previous appraisal/PDR document
- Employee's Self Reflection Preparation Document

The Manager should prepare for the PDR meeting, by reviewing the objectives set during the previous PDR cycle and considering what evidence is available to demonstrate progress.

Employee Preparation:

It is important for employees to undertake their personal preparation for the Performance and Development Review meeting. This should include reflection on performance over the past period, including

- What has gone well and what not so well?
- How has training and development undertaken assisted the individual in their role?

Employees should use the PDR Preparation Document to assist them in their personal reflection. On completion, the Employee should provide their Manager with a copy of the Preparation Document in advance of the meeting. Where the meeting is not within normal working time consideration must be given to the employee's personal circumstances e.g. childcare.

4.2. Date, Time and Location for Meeting

The PDR meeting should be planned in advance, enabling adequate preparation. The meeting should take place in a confidential and quiet location, which is free from interruptions and disturbance. Sufficient time, at least 30 minutes, should be set aside for the meeting. Wherever possible this meeting will be within normal contracted working hours and will in all circumstances be paid.

5. The Performance and Development Review Discussion

The first part of the review discussion will include a reflection of the previous year. What has gone well and could be even better? There will be a review of progress with respect to performance against key responsibilities/job description, an assessment of the employee's commitment to the Trust values and a review of progress in relation to previous objectives set. Where the employee has engaged in development and training activities in the past PDR period, there should be a discussion about what development has taken place and how this has assisted the individual with their role.

The second part of the PDR discussion should focus on the future. This will include, setting appropriate objectives (see Section 6), identifying any areas for development or improvement and discussing what support, training and development may be required to support the appraise in their role.

6. Setting Objectives

Objectives will be set by the Manager and should be relevant to the employee's job and link to the Departmental Plans and the Trust Improvement Plan. The scope of the objectives set should be relevant to the level and type of role undertaken.

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The number should be proportionate to the role. For example, a lunch time supervisor working 2 hours a day, might have one objective.

For some roles, it will be possible to link objectives to relevant professional or occupational standards.

Managers should discuss future objectives with the employee, ensuring that they are relevant to the role and context. Objectives should be: SMART (Specific, Measureable, Achievable, Realistic and Time bound).

It is important to discuss and determine what will be used as evidence of success. This will assist in providing clarity at the next review stage as to whether or not the objective has been achieved and how it has been achieved. The system of setting SMART objectives will assist with this.

Objectives should be mutually agreed where possible. Where it is not possible to achieve agreement on the objectives, the decision of the Manager is final.

7. Recording the Outcome of the Performance and Development Review Discussion

7.1. Outcome of the Review

The outcome of the review and planning discussion should be recorded using the Performance and Development Review Form. This will be a confidential record of what was discussed and proposed. This will include a record of the objectives agreed and the success criteria aimed for. The record should also refer to the training and development needs identified and how these might be addressed. The Employee must be given an opportunity to comment on the review and the review document should be signed by both parties.

7.2. Method of Recording the Outcomes

It is important that both parties have a copy of the objectives and the final review document.

8. Ongoing Monitoring and Review (and Mid-Year Review Meeting)

An effective Manager should monitor and review staff performance on an ongoing basis, providing regular feedback and encouragement including allowing time for informal discussions.

It is also good practice to include a planned Mid-Year Review meeting. This will provide an opportunity for a confidential discussion regarding progress with the objectives, discuss the role and performance and provide an opportunity to address any issues or areas of concern which may have arisen. In some cases, it may be necessary to adjust an objective, discuss and seek to resolve issues and challenges and identify additional support or training. These should be open and honest discussions with aim of ensuring that there are no surprises at the time of the next review meeting.

9. Development and Training

The PDR discussion should include the identification of development and training needs and how the identified needs might be most effectively met.

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All staff have a shared responsibility for their own professional development and training and as part of this should engage fully with training and development opportunities provided through the Trust. Development and training can be delivered through a variety of means. For example; coaching, mentoring, team meetings, networking, on the job training, working on projects, individual reading and research, attending in-house or external training events and studying for professional qualifications.

10. Monitoring and Evaluation

The Head and the Trust will monitor the operation and effectiveness of the Trust's appraisal arrangements. This will include the sampling of objectives to ensure that they link to Trust priorities, are SMART and are appropriate for the role and level of the member of staff.

11. Equal Opportunities

The Trust is committed to ensuring consistency of treatment and fairness and will abide by all relevant equality legislation. This policy will operate in accordance with the Trust's commitment to equality of opportunity and diversity.

12. Appeals

Where an employee is dissatisfied with the PDR process or the PDR report they may seek to resolve their concerns with the appraising manager directly within 10 days of receiving their performance and development review report.

Should it prove impossible to resolve matters through this route, the employee may appeal in writing to the Headteacher or appropriate Director, in the case of central functions.

Appeals will be heard by a more senior manager. This will usually be a member of the senior leadership team as delegated by the Headteacher/Director. If the member of staff reports directly to the Headteacher/Director the appeal will be heard by the Executive Headteacher or a member of the Executive Team if delegated.

If the employee reports to the Executive Headteacher the appeal should be heard by a panel drawn from the Governing Body.

The employee has the right to be accompanied at an appeal hearing by a professional representative or work colleague.

The appeal hearing will be arranged as quickly as possible and within 15 working days of receipt of the employee's written appeal and will take into account the flexibility required for all parties to attend.

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