The Learning Partnership

Performance Development Guidance

2023 - 2025

Contents

Performance Development Cycle

Performance development cycle

Background

Performance Development is a strategic People priority across the Trust to ensure there are clear targets to support school improvement for all learners, to develop a positive professional culture, and to prioritise the ongoing professional development of all staff.

This document outlines the process of performance development for all teaching and support staff, and the timelines for implementation at each point in the cycle.

Trust performance development platform – BlueSky

Bluesky is an online portal all staff should use for the setting and monitoring of performance development targets. You should have received login details for the system. If you are unable to access the system, please contact your line manager in the first instance.

User guides to support you in using Bluesky are provided throughout this document, including a 'how to' for setting each objective and monitor progress.

Performance development term by term

Below is the annual cycle of meetings you can expect to have during an academic year. All of the below meetings will be captured within Blue Sky

Half-term	Title	Description
Autumn 1	Objective setting meeting	Meeting to agree objectives for the academic year
Autumn 2	Monitoring meeting	Short meeting to monitor progress – amendment objectives as required
Spring 1	Monitoring meeting	Longer meeting to consider progress and any additional support needed
Spring 2	Monitoring meeting	Short meeting to monitor progress
Summer 1	Monitoring meeting	Short meeting to monitor progress – indicative outcomes prior to year-end review
Summer 2	Year-end review	Formal documentation of outcomes for the year (finalisation pending examination results in some cases)

Objective Setting Overview

Objective Setting Overview

Timescale

Teachers	31 October 2023
Support Staff	14 November 2023

Guidance on each objective type

Each staff member should be set 3 objectives. These are:

- Objective 1 – Supporting the development and improvement of your school
- Objective 2 – Supporting the promotion of TLP Behaviours throughout the trust
- Objective 3 – Personal Growth Plan – target linked to own continuous professional development

Objective Setting meeting

Line managers should hold an objective setting meeting with each line person prior to finalising objectives for the year. The sequence of preparation for this meeting should be as follows:

- Line manager considers a suitable objective 1 for the staff member and prepares this in draft.
- Line manager asks line person to complete TLP Behaviours self-assessment and relevant performance standard self-assessment.
- Line person notifies line manager when self-reviews complete.
- Line manager reviews self-assessments and drafts objectives 2 and 3.
- Line manager organises meeting.
- During the meeting the three draft objectives are discussed, amended as required, and finalised.
- Once final these are validated by the line person.

Objective 1

Objective 1 – Supporting the development and improvement of your school

Context and purpose of the objective

- This objective is intended to directly link your work to the wider ambitions of the school, and to ensure goal congruence throughout the school/trust, such that your targets help to achieve trust or school-wide goals.

- The objective set should be directly linked to an area identified on the school development plan. For example, improving the outcomes for students in receipt of pupil premium or those with SEND.

- This objective is likely to be similar to performance development targets you may have been set in the past and may in part include the rolling forward of outstanding or partially completed targets under previous performance development processes.

How the objective should be set

- This objective should be **SMART** (specific, measurable, achievable, relevant, time specific)

- When setting the objective, you will be asked to complete details in the following areas:

  - **Objective** – The title or summary of the target

  - **Success criteria** – Outlines what success will look like. This should ideally include quantifiable measures of success (e.g. pupil outcomes, attendance data, etc.) and indicate where this data will come from.

  - **Actions** – Details the key actions to be taken to achieve these objectives. Aim to include 3-5 actions at least, as these will be referred to throughout the year in ongoing monitoring discussions.

  - **CPD and support required** – This indicates the support you will need from the school/trust in order to achieve the objective, e.g. materials to purchase, CPD courses, staff release to work on the objective, etc.

  - **Supporting evidence** – Indicates what evidence will be used to evidence progress against the objective. This should speak to the performance criteria above.

- You will then need to 'link' the objective to the school/trust development plan (see guide below)

Objective 1 – How to guide for line managers

Within the manage tab, select **create objective**
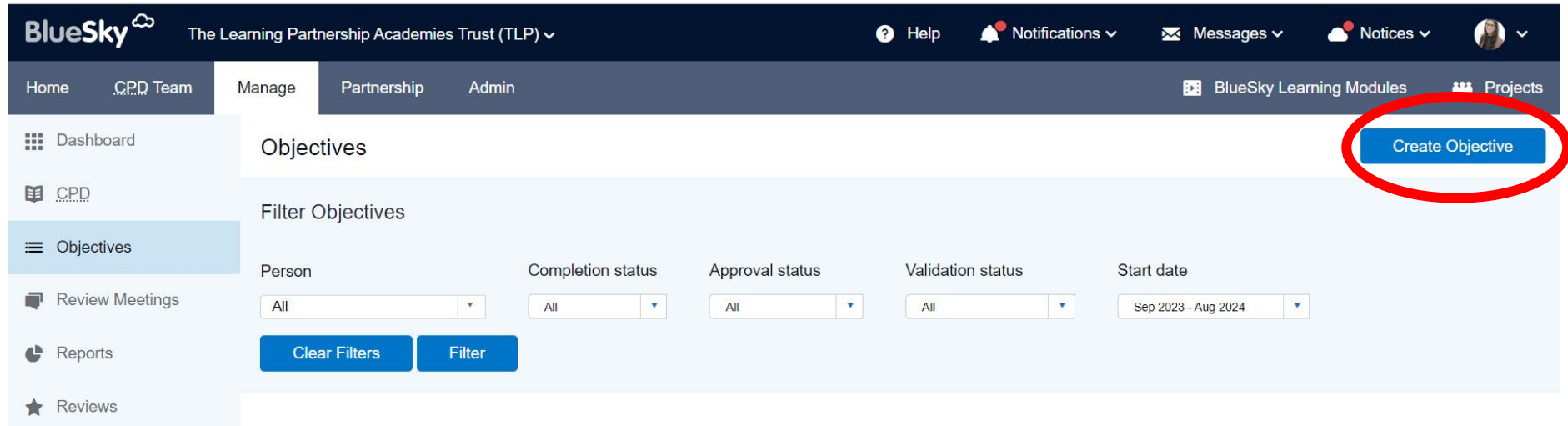
Enter details of the **objective, target date**, and **success criteria**

Create Objective

Select user
This Objective will be automatically added to the list of Objectives for the user you select

[Stacey Peel ▾]

Objective ❓

e.g. Develop 'Performance Development' process, incorporating TLP Behaviours and Personal Growth Plans for all staff, and oversee, monitor, and measure its implementation during the 2023-24 academic year

Date Objective set ❓

[12 ▾] [September ▾] [2023 ▾]

Date agreed Objective will be met ❓

[31 ▾] [August ▾] [2024 ▾]

Success Criteria ❓

All staff to have 3 objectives, covering a SMART target, a Professional Behaviours target, and a Personal Growth Plan (professional development target)
Evidence of all staff having undergone routine monitoring meetings during the year
Evidence of all staff having undergone a year end review

Evidence will be collected via Blue Sky reporting

Sidebar navigation:
- Dashboard
- CPD
- Objectives
- Review Meetings
- Reports
- Reviews

Complete **actions**, **CPD and support required**, and **supporting evidence**

Actions   ?

Support schools in adding school improvement plans to BlueSky
Work with BlueSky to develop templates to support TLP behaviours self-assessment and objective setting
Identify suitable performance standards against which staff performance and professional development should be assessed
Ensure all staff are registered on BlueSky with line manager assigned

CPD and support required   ?

Access to funding to work with BlueSky as required to develop templates
Support from The Learning Institute, specifically the Director of TLI, in creating professional development options, and with the teacher orientated elements of the entire PM process
Support from the executive in rolling out the process and engaging with heads with the new approach throughout the year

Supporting Evidence   ?

Reporting from Blue Sky
Applications and uptake within TLI for professional qualifications and apprenticeship routes
Supplementary reports to Finance and Staffing Committee

Cancel   **Next step**

'Link' the objective by ticking the relevant priorities which the objective supports (this may be more than one priority, or include a trust as well as a school priority)

The objective will show as **not approved**, pending review and agreement with the line person

Line person guide to reviewing and approving objective 1

Select the relevant **objective** within the **objectives** tab on the left of the screen

Review the objective, and once discussed and finalised with your line manager, click **approve** in the top right of the screen

Confirm you approve the objective

The objective now shows as approved. The objective remains incomplete at this stage as work has not begun towards the target.

NB. Validation is used to confirm the completed status of an objective and is **only relevant during year-end review**.

Objective 2

Objective 2 – Supporting the promotion of TLP Behaviours throughout the trust:

- This objective will engage directly with the TLP Behaviours outlined with Headteachers at the first Headteacher and Trust meeting in September 2023. These are:
    - Show and expect **respect**
    - Maintain **self-awareness**
    - Exhibit **resilience**
    - Ensure high quality **communication**
    - Prioritise making a **wider contribution**

- The objective will be linked to demonstrating these professional attributes, and ensuring these attributes are demonstrated by those you manage, where applicable.

- This objective is not intended to reflect on **personal** characteristics, but those attributes which staff exhibit in a **professional** context. Staff will approach these professional attributes in different ways, reflective of their own working styles and behavioural patterns. In setting this objective, we are asking staff to consider how effective they feel their approach is, and how they might refine it further to support their professional practice.

- We would expect the evaluation activity to identify all areas as meeting/exceeding before the target set focuses on career progression/aspiration.

- The steps required to complete Objective 2 are as follows:

    - Line person completes self-assessment on Bluesky and makes suggestions regarding a professional objective

    - Line manager reviews self-assessment, and in line with the below considerations, develops draft objective for discussion within BlueSky

    - Where an area is identified as requiring development (category "A") an objective focusing on this area would be expected

    - Where there are no areas identified as requiring development, objectives should focus on moving from meeting to exceeding standards

    - We would not expect any staff to rate all areas as "D" – clear strengths. All staff will have areas for further professional development and should staff grade themselves as "D" in all areas, line managers may wish to consider whether "self-awareness" is an area in which further professional development may be required

o   Meeting held between line person and manager to confirm objective

o   Line person accepts objective on Bluesky and begins recording evidence to support development in this area

Selecting the 'Demonstrating and Promoting the TLP Behaviours' Bespoke Standard

On logging into BlueSky you will land on your home page. Select edit profile in the top left of the screen.
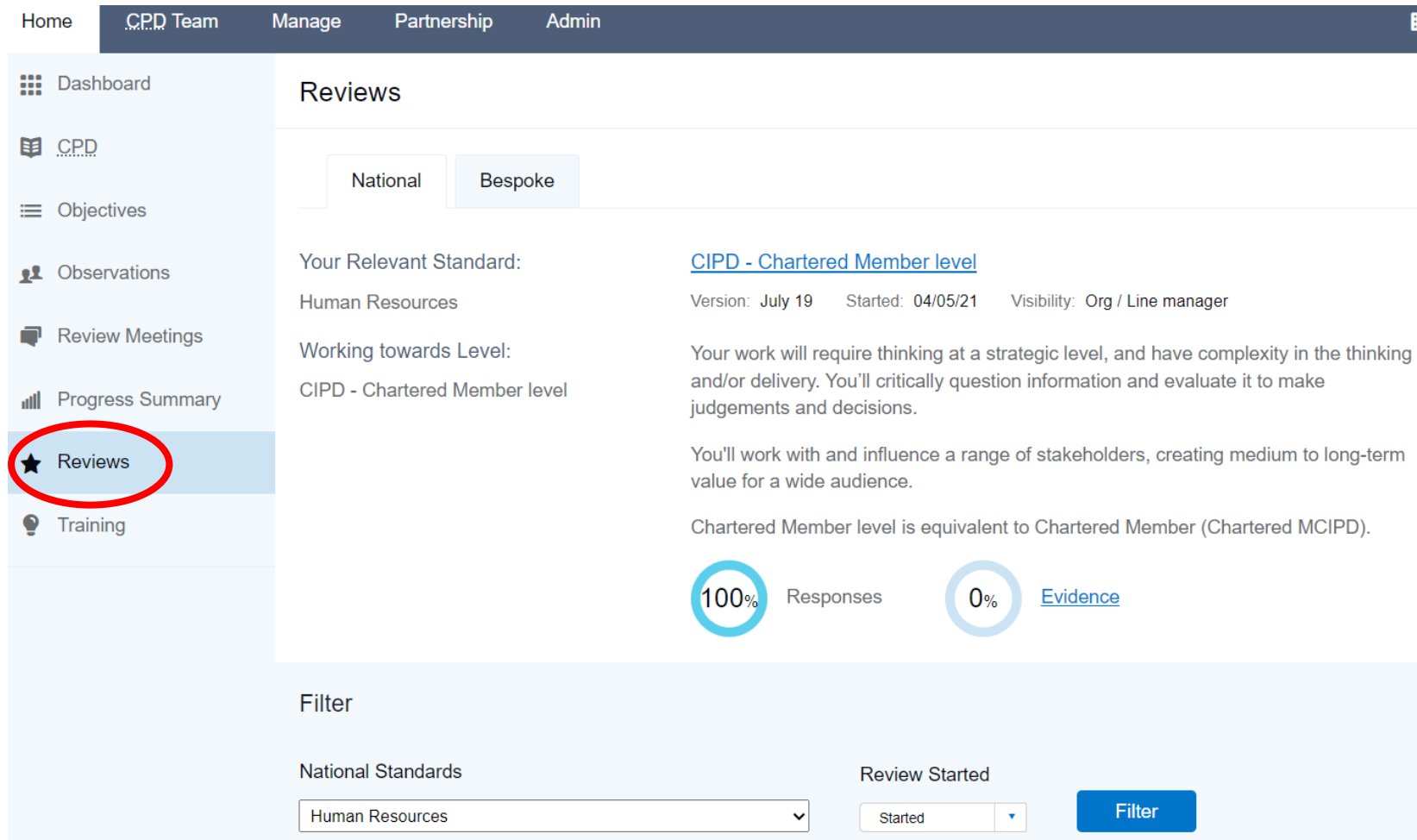
Under "**Bespoke Standards**" select the standard in the drop-down box "**Demonstrating and Promoting the TLP Behaviours**" and save.
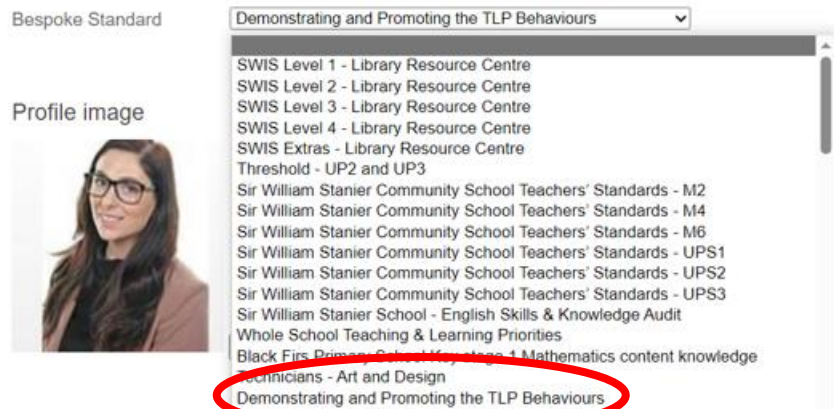
Completing a self-evaluation against Demonstrating and Promoting the TLP Behaviours – linked to Objective 2

In the home tab, select **reviews** on the left-hand side of the screen.

Click the Bespoke tab. Select **Demonstrating and Promoting the TLP Behaviours**

Complete the self-evaluation by rating yourself against each statement set in each section. Once you have changed the criteria rating of each statement to reflect your current ability, click **continue to next statement set** in the top left-hand side of the screen.

Bespoke - Demonstrating and Promoting the TLP Behaviours

Visibility: Visible to your organisations and line manager   Change visibility » ❓

Continue to next statement set »   Overview of your responses for Demonstrating and Promoting the TLP Behaviours »

Behaviours

Show and Expect Respect (1)

| Statement | Analysis | Evidence | Prompt | Objectives | CPD |

Change rating criteria »

Key: 🅰 Development needed 🅱 Meets the statement 🅲 Exceeds the statement on occasions 🅳 Clear strength

For each statement, select an answer which corresponds to the level you have reached.

1. Contributing to a culture of mutual trust and respect which supports effective relationships.   🅰 🅱 🅲 🅳

2. Developing effective professional relationships with colleagues.   🅰 🅱 🅲 🅳

3. Having high expectations for the conduct of pupils and staff, and relationships between staff and pupils are exemplary.   🅰 🅱 🅲 🅳

Change visibility to ensure that your review can be seen by your line manager. Change the selection to **visible to your organisations and line manager** and click **Save**. The visibility options can only be changed once a review has been started.

Reviews

Bespoke - Demonstrating and Promoting the TLP Behaviours

This review is currently visible to your organisations and line manager

Set this review's visibility

○ Private

The review and your evidence will not be visible to your mentor(s). It will also not be visible as part of a needs analysis report for your organisation.

○ Visible to your organisations

Your mentor(s), and senior managers in your organisation(s) will be able to view this review and use it for needs analysis purposes.

⦿ Visible to your organisations and line manager

Your mentor(s), and senior managers in your organisation(s) will be able to view this review and use it for needs analysis purposes. Additionally your line manager will be able to view the review.

Cancel   **Save**

When the final section has been completed, click Overview of your responses for Demonstrating and Promoting the TLP Behaviours to see a visual overview of your answers against the key.

Line person/reviewee **Overview Comment** related to result - should include perceived target area for objective for line manager to review and discuss in meeting.

Bespoke - Demonstrating and Promoting the TLP Behaviours

Key: [A] Development needed [B] Meets the statement [C] Exceeds the statement on occasions [D] Clear strength

Dimensions	Responses
Behaviours	21% 79%

Analysis

Strengths and Areas for Development

Your responses have not enabled us to highlight any particular Strengths or Areas for Development yet. Please continue to review yourself against the statements so that we are able to highlight these areas.

Review Details

Started: 03/10/22

Last updated: 12/09/23

Visibility: Visible to your organisations and line manager
Change visibility »

Reset responses

100% Responses   0% Evidence

Overview Comment

Communication is the area for development for this academic year:

*Setting clear expectations which help communicate shared values that improve whole school culture.

I will aim to do so using the SMART format and establish clear deadlines for completion. This should add clarity as well as increase efficiency within the team, improving the service we provide to the schools we support.

⑦ Support

Objective 2 – Line manager guide to setting an objective

Login to home. Click **Manage** tab in top left to view the dashboard for the organisation. Click **Reviews** from the menu on the left-hand side of the screen.

Select bespoke standard **Demonstrating and Promoting the TLP Behaviours** of the line person you wish to set the objective for.

You will then be able to review your line person's responses.

Stacey Peel
Bespoke - Demonstrating and Promoting the TLP Behaviours

Return to Reviews index »   View Evidence Overview (0%) »

Key: **A** Concern – below expectation and requires immediate improvement   **B** At standard – at (or on track to reach) the expected standard   **C** Secure – meets expectations and sometimes exceeds the expected standard   **D** Expert – exceeds expectations (and practice is shared within and beyond the school)

Dimensions	Responses
Behaviours	37% 63%

Analysis

Click **Behaviours** to view and review detailed line person responses and identify agreed areas for development or potential areas for discussion, for instance, where the line manager's assessment of the line person may differ from their self-assessment.

Show and Expect Respect (1)

View evidence »

1. Contributing to a culture of mutual trust and respect which supports effective relationships.   **C**

2. Developing effective professional relationships with colleagues.   **C**

3. Having high expectations for the conduct of pupils and staff, and relationships between staff and pupils are exemplary.   **C**

Set **objective** related to the standard identified, taking into account your line person's overview statement suggestions.

Objective ❓

> e.g. Communication - setting clear expectations which help communicate shared behaviours that improve whole school culture

Date Objective set ❓

`12 ▾` `September ▾` `2023 ▾`

Date agreed Objective will be met ❓

`31 ▾` `August ▾` `2024 ▾`

Success Criteria ❓

> Developing a clear approach to short and long term target setting with direct reports
> Providing clear guidance and support to headteachers, line managers, and shared service leads
> Capturing core TLP Behaviours within communications to all staff

Actions ❓

Use SMART framework when setting targets for direct reports
Undertake relevant CPD related to effective and empathetic communications (see BlueSky
Learning Modules)
Develop guidance for senior leaders and school staff on effective communication in line with TLP
Behaviours

CPD and support required ❓

Mentoring/modelling with senior staff
Time allocated to CPD activities outlined above
Support with the development of whole trust guidance and communications

Supporting Evidence ❓

360 feedback from line people
360 feedback from headteachers and shared service leads
Staff wellbeing survey responses
Line manager feedback from routine line management meetings
Continual self-appraisal against values during half-termly monitoring meetings

Cancel   **Next step**

NB – TLP Behaviours objectives are necessarily subjective in content, and as such supporting evidence will rely on individual's interpretation of behaviours, attitudes, and working styles. Line managers should be sensitive to this when setting and assessing objectives on an ongoing basis.

Link the objective to the relevant **TLP Behaviours** attribute prior to saving.

Select relevant standard

National Standard - CIPD - Associate level   Show details

Bespoke Standard - Demonstrating and Promoting the TLP Behaviours   Hide details

- ☐ Show and Expect Respect (1)
- ☐ Maintain Self-Awareness (2)
- ☐ Exhibit Resilience (3)
- ☑ Ensure High Quality Communication (4)
- ☐ Priorise Making a Wider Contribution (5)

Cancel (You will lose this Objective) »   **Save**

The review and agreement of this objective with the line person should then be completed as for Objective 1.

Objective 3

Objective 3 – Personal Growth Plan (Supporting your own continuing professional development):

- This objective will focus on supporting you in your ongoing professional development and career development.
- The line person will complete a self-assessment against the relevant standards relating to their profession i.e. Teacher (National Teacher Standards). In the majority of cases staff will find this has been assigned to them within BlueSky but check that this standard remains appropriate.
- Some staff may not have an occupation or standard assigned to them. The occupation and standard must be added to the user's profile before objective 3 can be set. Guidance on how to do this is provided within the 'how to' guide below.
- The results of the self-assessment will identify areas of development which should be used to determine the professional development target. Line people should indicate within the overview statement at the end of the self-assessment 1-3 proposed CPD activities to support their development.
- When considering CPD activities, staff should refer to the develop opportunities available through The Learning Institute. Some of these are detailed on the following page. Further opportunities for all staff will be shared on an ongoing basis as these become available.

Roles and Example Standards

ECT	Early Career Framework
Teacher (M3 and above)	National Teacher Standards 2012
TLR Holders (Middle Leadership)	Leadership Standards
SLT	Headteacher Standards
Technician	Technicians Core Standards 2015
Administration	Level 1 Administration and Organisation Level 2 Administration and Organisation
Higher Level Teaching Assistant	(HLTA) Higher Level Teaching Assistant
Teaching Assistant	Professional Standards for Teaching Assistants 2016 Level 2 - General

	Level 3 - Behaviour/Guidance/Support
	Level 3 - Support and Delivering Learning
	Level 4 - Behaviour/Guidance/Support
	Level 4 - Supporting and Delivering Learning
Support Staff	Support Staff Core Competencies 2012
	Support Staff Core Standards 2015

The Learning Institute - Training Opportunities

Career Stage	Training Opportunities
Classroom Teacher	School Internal CPD Programmes
	Early Career Framework
	BlueSky Learning Modules
	TES Develop CPD modules
	Mentoring of Trainee and Early Career Teachers
	Work with a coach, mentoring and 'Buddying' within and outside of department
Aspiring or current Middle Leader	As above, plus:
	Engagement with TLP Network Groups
	TLR 3 Projects (internal/TLP wide)
	Specialist NPQs
	Leading People Programme
Aspiring or current Senior Leader	As above, plus:
	NPQSL, NPQH, NPQEL
	Secondment Opportunities (Internally and across TLP)
	Leading People Programme

Educational Support Staff	Apprenticeships (Teaching Assistant/Learning Support Assistant, Lab technician, etc.)
	BlueSky Learning Modules
	TES Develop CPD modules
	Work with a coach, mentoring and 'Buddying' within and outside of department
	Teaching Assistant Training Programme
	Supplementary TLI led training programmes *(currently under development)*
Clerical, Administrative, and Organisational Support Staff	Apprenticeships (school business professional, business administer, facilities management, catering, etc.)
	BlueSky Learning Modules
	TES Develop CPD modules
	Work with a coach, mentoring and 'Buddying' within and outside of department
	Engagement with TLP Forum Groups *(currently under development)*

Selecting the relevant professional standard against which to undertake a self-assessment

On logging into BlueSky you will land on your home page. Select **edit profile** in the top left of the screen.
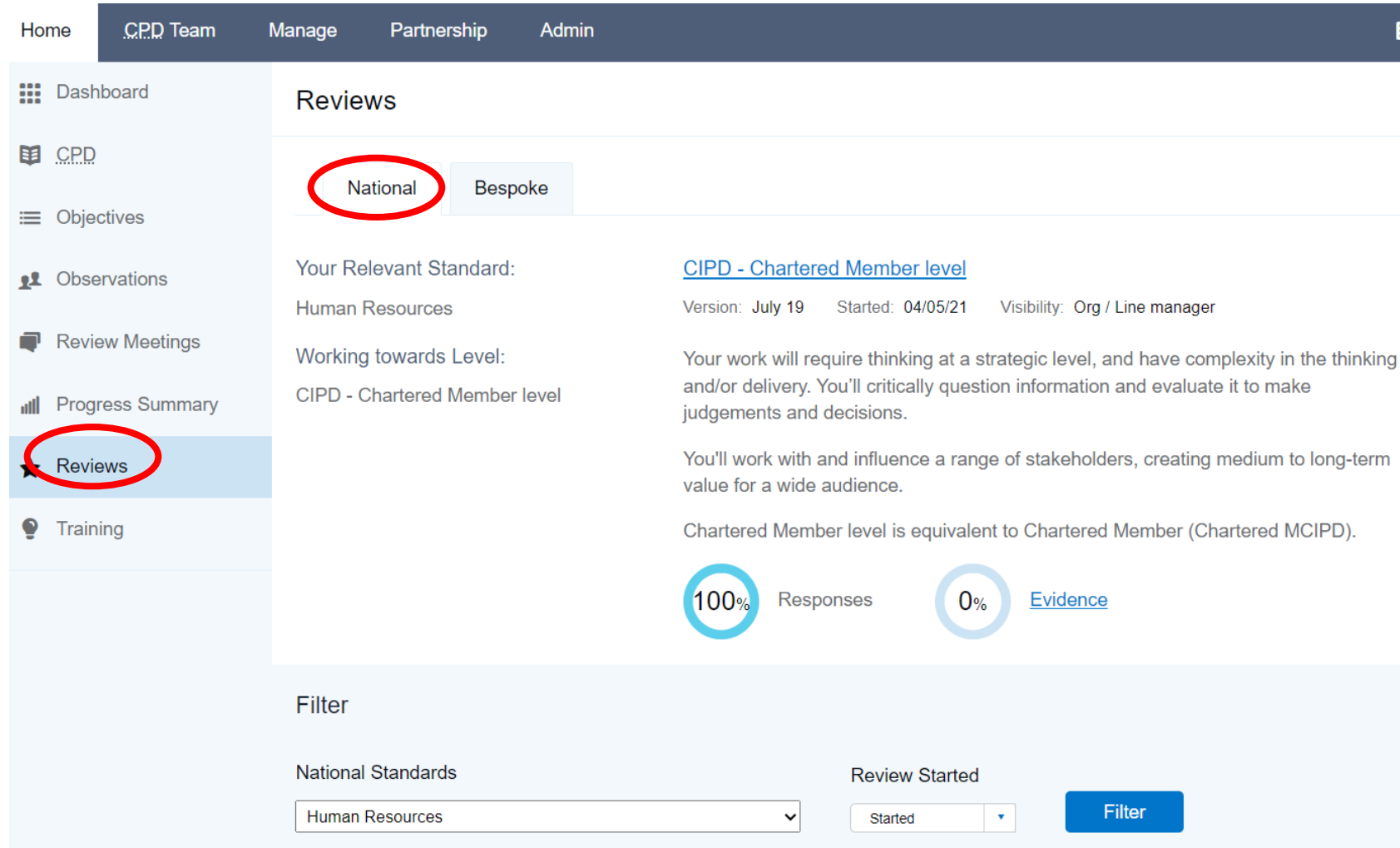
Update your **occupation** to gain access to relevant professional standards and select the **relevant standard** to your role.

Once updated, the relevant standard will be accessible within "**Reviews**". See below for further guidance.

Completing the self-evaluation against the selected role standard – Linked to Objective 3

Login to BlueSky and select reviews on the left-hand side. In the national tab select the standard for your job role and commence the self-assessment

Work through each of the statement sets of the standard until this has been completed. Once you have started the review you must change the visibility (as with objective 2) to ensure your line manager can view your responses.

Reviews

CIPD - Professional Map - CIPD - Chartered Member level

This review is currently visible to your organisations and line manager

Set this review's visibility

○ Private

The review and your evidence will not be visible to your mentor(s). It will also not be visible as part of a needs analysis report for your organisation.

○ Visible to your organisations

Your mentor(s), and senior managers in your organisation(s) will be able to view this review and use it for needs analysis purposes.

● Visible to your organisations and line manager

Your mentor(s), and senior managers in your organisation(s) will be able to view this review and use it for needs analysis purposes. Additionally your line manager will be able to view the review.

Cancel   **Save**

When the final section has been completed, click overview of your responses for role standard chosen to see a visual overview of your answers against the key.

Enter an overview comment to complete the review. Within your overview comment, identify your key strengths, key areas for development, and suggest 1-3 ways in which you might address areas for development. This might include an externally delivered training course, internally delivered training course, mentoring, or coaching from a more experienced member of staff, shadowing a more experienced member of staff, or engaging with a subject of role network group for ongoing support or guidance in these areas.

Dimensions	Responses
Core knowledge	11% / 78% / 11%
Core behaviours	3% / 64% / 33%
Specialist knowledge	15% / 27% / 49% / 9%
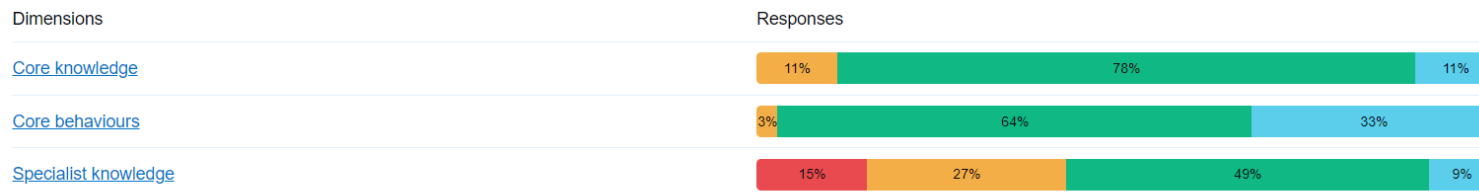
Analysis

Strengths

✓ Core behaviours

Review Details

Started: 04/05/21

Last updated: 12/09/23

Visibility: Visible to your organisations and line manager
Change visibility »

[Reset responses]

100% Responses   0% Evidence

Overview Comment

I need to focus on increasing my specialist knowledge in finance. This will be achieved by working with Headteachers and the Finance Director, taking a more collaborative approach to recruitment, with explicit budget, curriculum, and succession planning considerations, and by managing my own budget.

I will continue to attend and present at Finance and Staffing meetings, increasing my exposure to trust wide finance related matters.

Lastly, I will manage a dedicated wellbeing budget across the year in support of the work around the Education Staff Wellbeing Charter, Sodexo staff benefits and staff wellbeing.

? Support

Setting the objective related to selected role standard – linked to objective 3

Under the **manage** tab, the line manager will select **objectives** and **create objective**.

The objective will be completed in the same way as with objectives 1 and 2. A brief example is shown again below.

Objective ?

Complete Senior People Professional Apprenticeship and L7 CIPD qualification

Date Objective set ?

12 ∨ September ∨ 2023 ∨

Date agreed Objective will be met ?

31 ∨ October ∨ 2024 ∨

Success Criteria ?

Successful completion of end point assessment professional discussion
Successful completion of all L7 CIPD modules, achieving a Pass grade or above
MCIPD accreditation awarded

As with objective 2, objective 3 should be linked to the aspect of relevant role standard before clicking save:

Select relevant standard

National Standard - CIPD - Associate level   Hide details

☐ People practice - Understanding the range of people practices needed to be an effective people professional. Things to start thinking about. Use these prompts to reflect on your understanding of People practice and uncover areas for future professional development. ● How does your area of work impact and relate to other areas of people practice? ● How do policy, regulation and law inform people practices in your area of work? ● What consulting, coaching and mentoring models and tools do you use in your work? (People Practice)

☐ Culture and behaviour - Understanding people's behaviour and creating the right organisation

Review by your line person and final completion will be as for objective 1.

Recording evidence of progress against objectives throughout the year

Recording evidence of progress against objectives throughout the year

Evidence gathering to support progress against objectives

During the year line people should gather evidence of progress against each objective on an ongoing basis. This evidence can then be reviewed and discussed during half-termly monitoring meetings, as well as during the final year-end review meeting.

BlueSky provides a range of facilities by which evidence can be captured. Some of the key functions and links to how to guides for each are provided below (NB – staff must be logged into BlueSky in order for the following links to function correctly).

CPD activities

Continuing professional development activities can be linked to particular objectives. A guide on recording CPD activities within BlueSky

CPD - Learning and Development – BlueSky Knowledge and Support (blueskyeducation.co.uk)

Lesson observations/practical observations (where applicable)

Where relevant, lesson observations can be captured within BlueSky and linked to objectives. Line people should agree with their line manager if observations will be used to support ongoing performance development discussions, and if so when and how these observations will take place.

A guide on recording lesson observations is available via the following link:

Creating Observations – BlueSky Knowledge and Support (blueskyeducation.co.uk)

A further guide on linking observations to CPD is available here:

How do I link my Observations to CPD or Objectives? – BlueSky Knowledge and Support (blueskyeducation.co.uk)

Other reflections/notes and uploading evidence/links

See the below pages for a how to guide on these methods of evidence capture.

Other reflections/notes

Staff may wish to provide a brief overview note of progress against an objective, for instance in advance of a monitoring meeting. This can be done using the note function at the foot of each objective.

Supporting Evidence

Reporting from Blue Sky
Applications and uptake within TLI for professional qualifications and apprenticeship routes
Supplementary reports to Finance and Staffing Committee

Notes

No notes have been added yet

Add a note…

Add note

Documents and links

Documents and links to evidence progress can be uploaded to an objective. Select the objective for which evidence will be added and follow the link to **manage evidence**.

e.g. Develop 'Performance Development' process, incorporating TLP Behaviours and Personal Growth Plans for all staff, and oversee, monitor, and measure its implementation during the 2023-24 academic year

Owner: **Stacey Peel**   Created by: **Leanne Takaki**   Date set: **12 Sep 2023**   Agreed completion date: **31 Aug 2024**

Overview

Success Criteria

All staff to have 3 objectives, covering a SMART target, a Professional Behaviours target, and a Personal Growth Plan (professional development target)
Evidence of all staff having undergone routine monitoring meetings during the year
Evidence of all staff having undergone a year end review

Evidence will be collected via Blue Sky reporting

Actions

Support schools in adding school improvement plans to BlueSky
Work with BlueSky to develop templates to support TLP behaviours self-assessment and objective setting
Identify suitable performance standards against which staff performance and professional development should be assessed
Ensure all staff are registered on BlueSky with line manager assigned
Provide training materials to support staff in accessing Blue Sky, setting objectives, and conducting and monitoring year end review meetings

CPD and support required

Access to funding to work with BlueSky as required to develop templates
Support from The Learning Institute, specifically the Director of TLI, in creating professional development options, and with the teacher orientated elements of the entire PM process
Support from the executive in rolling out the process and engaging with heads with the new approach throughout the year

Actions

✓ Complete

⬇ Download PDF

Objective Status

⚠ Completion status: Incomplete

✓ Approval status: Approved

✗ Validation status: Not yet validated

Evidence

Documents
None

Links
None

Manage evidence

Linked Records

Objectives

Manage Evidence for CPD - Complete Level 7 apprenticeship and secure Level 7 CIPD accreditation.

| Documents | Links |

You haven't added any evidence yet

Label

CIPD Membership Certificate

Document
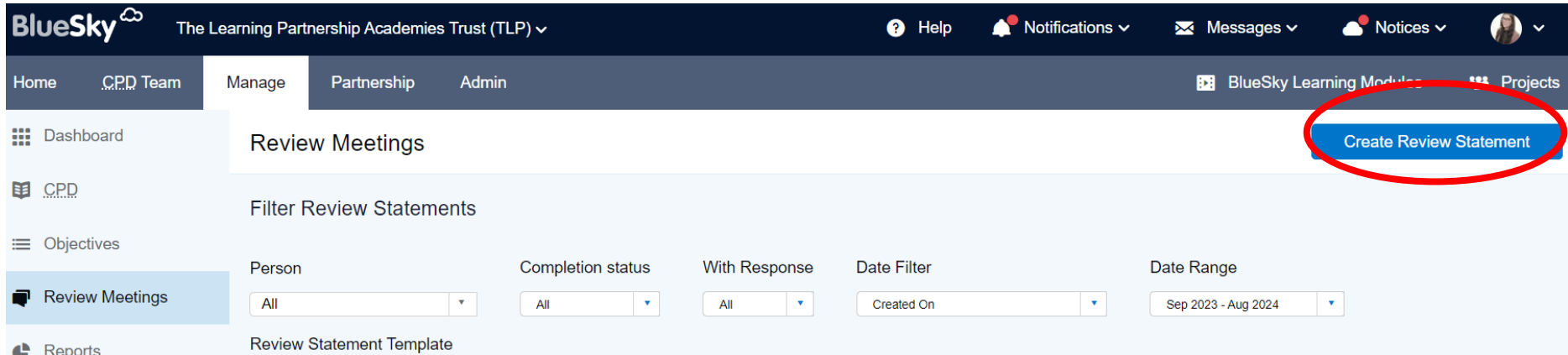
Choose File   CIPD Memb...rtificate.pdf

Upload
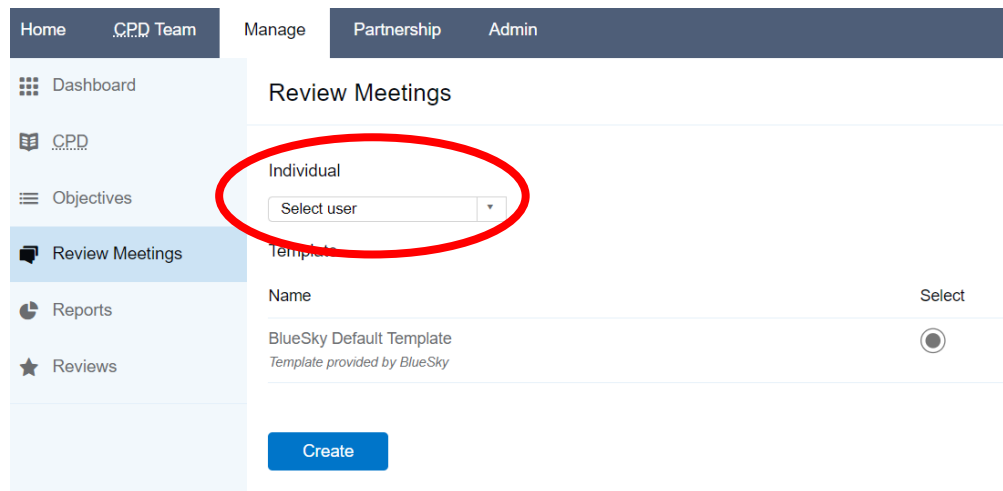
Guide to monitoring meetings

Recording Half-termly Performance Development Discussions in BlueSky

Login to Home. Click into the Manage tab on the left of the page, along from Home. In the menu on the left of the page under **Manage,** click **Review Meetings**. This will show you the members of staff you are set to line manage. Select **Create Review Statement** in the top right of the screen and choose the **Individual** the meeting is for from the drop-down menu.

To progress to the review, ensure the **BlueSky Default Template** is selected and click **Create**.

On the **Review Meetings** screen, the Review Statement Type to select for each of the half-termly pm discussions is **Meeting**. Meetings should be entitled '**Meeting: Half-term #**' and set to the correct academic year.

Template: BlueSky Default Template

Fields marked * are required.

Review Statement Type

| Meeting |

Title*

| Meeting: Half-term 2 |

For Academic Year*

| 01 Sep 2023 - 31 Aug 2024 |

Objectives

Viewing an Objective will open it in a new window

2024 (1)   Hide details

☑ e.g. Develop 'Performance Development' process, incorporating TLP Behaviours and Personal Growth Plans for all staff, and oversee, monitor, and measure its implementation during the 2023-24 academic year view

Objectives achieved status *

| Not applicable |

The **Objectives Achieved Status** is the only other compulsory drop-down field to complete. Select **Not Applicable** as the focus of these meetings is to ensure regular discussions about progress against the year's objectives are taking place. Other non-mandatory fields should be left blank.

A detailed record of the meeting discussion should be input into the Review Statement box. One you are happy with the statement then mark as complete **(NB – this cannot be subsequently edited. Therefore, we recommend you complete the statement with your line person, and/or invite them to review the draft version in person prior to marking as complete. Line people will be unable to view a draft version except via the line manager's account).**

Review Statement *

Record details of the performance development discussion here. This may include discussions that determine if the objectives are still fit for purpose or if there are any changes (e.g. change to roles and responsibilities, reduction in hours); developments and progress to date, support required from the school or trust, etc.

☐ Mark this Review Statement as complete?

Note that when you mark as complete, you can no longer edit or delete the Review Statement.

Cancel   Save

Guide to year-end review

Guide to year-end review

Timing of the meeting and instance when finalisation may not be possible prior to the end of the academic year

- As outlined within the Performance Development Cycle, the aspiration is for the majority of year-end reviews to take place prior to the end of the academic year to which they relate.

- In most cases, it will be possible to assess whether a line person has successfully met their objective before the end of the summer term. However, for some staff successful completion of an objective may partially rely on evidence from external examination results. For example, where an individual staff objective is linked to closing the attainment gap between disadvantaged and non-disadvantaged students, summer examination results would be an important piece of evidence used when assessing success, alongside other indicators such as in year internal assessment data.

- Line managers and line people should agree when the year-end review will take place (late summer/early autumn) when setting objectives.

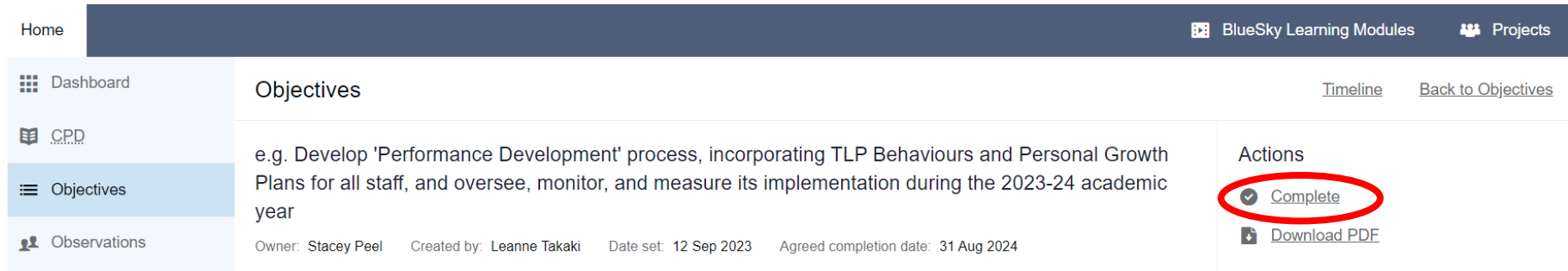## Preparation in advance of the meeting – line people

- Line people should ensure they have uploaded all relevant evidence to support progress against their objectives.

- Line people should mark objectives as complete and provide an overview assessment as to whether they feel the objective has been met.

- Line people should also reflect on the year and consider areas for continuing development or where further support is required.

- Staff should also consider broader questions such as their career aspirations and any steps line managers might take to support these.

Preparation in advance of the meeting – line managers

- Line managers should review completed objectives

- There should also be a broader consideration of the performance of the line person over the course of the year, to support discussion in the meeting.

- It may also be appropriate to consider target setting for the following year, although some of this may be reliant on the finalisation of other information. For instance, where a school's development plan for the following year has not been finalised

How to guide for line people – How to 'complete' an objective

Identify the objective you wish to complete, having first ensured you have uploaded your evidence of completion. Within the objective select '**complete**' under the actions area.

You will then be asked to assess whether the objective has been achieved, partially achieved, or not achieved and provide an assessment of overall impact. This statement should make reference to the evidence you have uploaded in support of your assessment.

BlueSky ☁   The Learning Partnership Academies Trust (TLP)

app.blueskyeducation.co.uk says

Are you sure? Once complete, you will not be able to make any changes to it.

[OK] [Cancel]

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Objectives

Complete Objective

e.g. Develop 'Performance Development' process, incorporating TLP Behaviours and Personal Growth and oversee, monitor, and measure its implementation during the 2023-24 academic year

Extent you have met the Objective

Achieved ▼

Impact statement

Insert relevant comments, progress, and evidence to support the extent you have met the objective

Please note that once you complete your impact statement you will not be able to make any changes to it

Cancel   [**Save**]

NB – Once completed the objective cannot be edited.

Line manager guide to creating the year-end review statements and validating objectives

The year-end review can be created in the same manner as a half-termly review meeting. The overview statement type selected here is 'End of Year View' and the meeting title will also be

Objective achievement status can be updated to reflect whether line people have failed to meet, partially met, met, or exceeded their objective targets.

In cases where objectives have been **met** and **exceeded**, **standards attained** will be met, and the **assessment status** will reflect this.

NB – Pay recommendations should be marked as N/A in all cases. In those exceptional circumstances where it is recommended that pay adjustments are made beyond standard pay progression, these should be discussed with a member of SLT within your setting.

Objectives achieved status *

Objectives met and some exceeded

Standards attained status

Met standards attainment

Assessment status

This statement represents a successful review

Line manager pay recommendation

N/A

Review Statement *

Leanne has met her objectives, and in the case of objective 3, the completion of her CIPD course and apprenticeship, exceed this based on her having been awarded a distinction within her apprenticeship

As part of the year-end review meeting, line managers should discuss each objective and validate their line person's assessment. Once completed the statement should be marked as complete and finalised.

Objectives

Validate Objective

Validation Agree ⌄

Viewing an Objective will open it in a new window

2024 (1)

app.blueskyeducation.co.uk says

Are you sure everything is correct? You can not change this once submitted.

OK   Cancel

Objectives achieved status *

Objectives met and some exceeded

Standards attained status

Met standards attainment

Assessment status

This statement represents a successful review

Line manager pay recommendation

N/A

Review Statement *

Enter applicable comments relating to the line person's objectives and their progression towards achievement of these

☑ Mark this Review Statement as complete?

Note that when you mark as complete, you can no longer edit or delete the Review Statement.

Cancel   Save

Key contacts

If you would like to arrange in person training or a Teams call for further advice and guidance, please contact us. We can arrange in-person and online training with ourselves, and we can access training from our dedicated BlueSky contact.

Director of People (HR)
Leanne Takaki: ltakaki@tlptrust.com

The Learning Institute (TLI)
Emma Hooley: ehooley@tlptrust.com

Secondary Contact
Jim Barlow, Director of Secondary: jbarlow@tlptrust.com

Primary Contact
Toby Hassall, Assistant Headteacher: thassall@black-firs.co.uk