



THE LEARNING PARTNERSHIP

‘Performance Development’ Policy and Process

Policy lead:	Director of People
Last review date:	September 2023
Next review date:	September 2025
Approval needed by:	Finance and Staffing Committee

Policy Equality Impact Screening

Date of screening: Leanne Takaki						
Name of person completing screening: September 2023						
	Does this policy have the potential to impact on people in any of the identified groups?		What is the expected impact of this policy on any of the identified groups			Notes
	Yes	No	Positive	Neutral	Negative	
Age		X		X		
Disability		X		X		
Gender Reassignment		X		X		
Race or Ethnicity		X		X		
Religion or Belief		X		X		
Marriage		X		X		
Pregnancy/ Maternity		X		X		
Sex		X		X		
Sexual Orientation		X		X		
Should the policy have a Full Equalities Impact Assessment? No						

This policy applies to The Learning Partnership employees only, does not form part of an employee's terms and conditions of employment and is not intended to have contractual effect. However, it does set out current policy and practice and employees are strongly advised to familiarise themselves with its content.

Purpose

This policy sets out the framework for a clear and consistent assessment of the overall performance of all employees within The Learning Partnership. It also sets out the standards expected of colleagues and the arrangements that will apply when individuals fall below those standards.

Capability is contained in a separate policy.

Support staff will be managed under this policy following the successful completion of their probationary period. Until then, performance will be overseen through the probationary process.

Workload and Equality Impact Assessment

Trustees are satisfied that the operation of this policy does not have a detrimental effect on the workload of those involved. Trustees are also satisfied that the terms of this policy will not impact adversely on members of staff who have a protected characteristic within the meaning of the Equality Act 2010. The Trust is committed to promoting equality and will ensure that the performance development process is fair and non-discriminatory.

Key Principles

Performance Development is a supportive and developmental process designed to ensure that all staff have the knowledge, skills, and support needed to carry out their roles effectively. It will help to ensure that colleagues are able to continue to improve their professional practice and to develop as individual practitioners and professionals. The Trust uses the 'BlueSky' online performance development platform as the mechanism for supporting and recording performance development in all its schools.

Performance Review and Feedback

The Performance Development review is comprised of different elements for teaching staff and support staff. Teachers will be assessed against the Teachers' Standards. Support Staff will be assessed against a Support Staff Standard, selected in BlueSky, commensurate with their job description. Staff with leadership responsibilities will have their performance appraised against the relevant standards (e.g. Teacher standards and Headteacher Standards).

The Learning Partnership believes that observations of staff in the discharging their duties is an important tool to assess individual performance. This is to identify any strengths and areas for development and will inform discussions and future development objectives as necessary. Observations will be carried out in a professional manner and involve feedback. Any observation which has taken place in a reasonable time period may be used in assessing standards. Unless there were exceptional circumstances, such observations would normally take place in the previous 12 months.

The CEO, Headteacher or other leaders may "drop in" or otherwise check on performance, at any time throughout the year to ensure that high standards of professional performance are established and maintained. The length and frequency of "drop in" observations will vary depending on specific circumstances.

Time Period

The Performance Development period will run for twelve months from September, with a mid-year review in February. Members of staff who join or leave the trust mid-term will experience a shorter timeframe. Equally, staff leaving to go on maternity leave will have discussions before the leave commences. Staff who have experienced a period of long-term sickness will have their objectives reviewed and revised on return to work to ensure they are suitable and achievable given the length of absence.

Individuals who are employed on a fixed term contract of less than one year will have their performance managed in accordance with the principles underpinning this policy. The length of the review period will be determined by the duration of their contract.

Reviewers

The CEO will be appraised by a committee of three trustees including the Chair and Vice Chair. The appointment of a suitably skilled and/or experienced external adviser to support this process is an option open to the Chair but it is not a requirement of this policy. This review meeting will also include the setting of objectives.

At School level, the Headteacher has final responsibility for determining who will review other colleagues. Usually, the relevant line manager will be responsible for reviewing and supporting performance.

Objective Setting

The objectives set will be specific, measurable, achievable, relevant, and time-bound (SMART). They will be fair and equitable in relation to staff with similar roles/responsibilities and experience and will have regard to what can reasonably be expected of any staff member at a given point of their career progression. The Trust recognises the importance of staff being able to achieve a satisfactory work-life balance. Objectives will take account of, where possible, the individual's professional aspirations. They will be such that, if they are achieved, they will contribute to improving the education of students at the trust and the implementation of any plans of the Trustees or CEO designed to improve the trust's education provision and performance.

All staff are likely to have three objectives:

Objective 1: Linked to the organisation's development plan

- The objective should be SMART (specific, measurable, achievable, relevant, time specific)
- The objective set must link directly to an area identified on the TLP/school development plan.

Objective 2: Demonstrating and Promoting the 'TLP Behaviours'

- The objective should be SMART (specific, measurable, achievable, relevant, time specific)
- The objective set must link directly to a TLP Behaviour/Behaviours
- This objective will be identified through self-evaluation against the behaviours and professional discussion with the reviewer

Objective 3: Personal Growth Plan

- The objective should be SMART (specific, measurable, achievable, relevant, time specific)
- The objective set must link directly to a relevant professional standard
- This objective will be identified through self-evaluation against the standard relevant to your role and professional discussion with the reviewer. This may extend beyond the professional standard to support career progression where all relevant standards are met.

Further guidance on objective setting is available within the detailed TLP Performance Development Guidance

Performance Development is an assessment of overall performance, however, objectives cannot cover the full range of an individual's roles/responsibilities. In all cases, it is expected that the basic job role is being completed to the required level. Objectives will, therefore, focus on the priorities for an individual for the cycle.

The reviewer and reviewee will seek to agree the objectives but where a joint determination cannot be made the reviewer will make the determination. Objectives may be revised if circumstances change and/or at the mid-year review point.

Reviewing Progress

The cycle has a specific start and end date, but it is expected that line managers will review and discuss progress with individuals throughout the year and record these review meeting on BlueSky. At the end of the cycle, the reviewer will draw together evidence about performance over the whole period, including by consulting:

- The relevant professional standards
- The individual's job description
- The individual's trust/school development plan objective
- The TLP Behaviours
- The individual's professional development needs relating to their 'Personal Growth Plan'

Assessment of performance against an objective will be based on the performance criteria set at the beginning of the cycle. Good progress towards the achievement of a challenging objective even if not fully met, will be assessed favourably.

The review cycle is annual, but on occasions it may be appropriate to set objectives that will cover a period over more than one cycle. In such cases, the basis on which the progress being made towards meeting the performance criteria for the objective will be assessed at the end of the first cycle and will be recorded in the report at the beginning of the next cycle.

Performance will be reviewed against the relevant criteria for the role. All performance will be graded as follows:

- Objectives – progress towards achieving the objectives will be graded using 8 incremental criteria, from 'not met' to 'exceeded'
- Standards – will be graded as either 'met' or 'not met'
- Overall assessment status – graded as either unsuccessful, partially successful, or successful

Appeals

Where a member of staff is dissatisfied with the application of the performance development process, they have recourse to the Trust's Grievance Procedure to pursue the matter.

Where a member of staff is dissatisfied with the recommendation or decision on pay, they have the right of appeal through the appeals mechanism of the Trust Pay Policy. (See Appendix 3 of the Pay Policy)

Concerns

Where there are concerns about any aspects of an individual's performance at any time the reviewer will then meet the individual to implement a performance improvement plan. The purpose of this is to:

- give clear feedback to the individual concerned about the nature and seriousness of the concerns;
- give the individual concerned the opportunity to comment and discuss the concerns;
- agree any support (e.g. coaching, mentoring, structured observations), that will be provided to help address those specific concerns;
- revise objectives;
- make clear how, and by when, the appraiser will review progress against revised objectives, allowing reasonable time for improvement and regular review. The amount of time is up to the line manager but should reflect the seriousness of the concerns;
- explain the implications and process if no, or insufficient, improvement is made.

In these circumstances, the reviewer and reviewee **must** meet on occasions throughout the term to discuss these concerns. It may be appropriate to revise and amend objectives to reflect significant concerns. If this does not result in improvement, the employee will be notified that the 'Performance Development' system will no longer apply and that their performance will be managed under the Trust's Capability Policy, triggering commencement of the formal capability procedure.

Judgements & Standardisation

No judgement should be confirmed until the line manager has held discussions with relevant colleagues. Provisional judgements will be discussed in faculties or support teams as appropriate and subsequent standardisation will be undertaken. The Director of People will have overall responsibility for the quality assurance of the appraisal process across the trust. The Headteacher will have overall responsibility for the quality assurance of the appraisal process across each school. This will include ensuring consistency and equality of application of the process throughout the trust.

Training for Reviewers

Guidance and any training necessary will be made available on how to conduct the process to ensure consistency and standardisation.

Pay Progression

Whilst the Trust is keen to reward good performance, there has been an explicit movement away from performance related pay. It is expected that staff will increment through the salary range for their role, on their current pay scale (e.g. Main pay scale, or range for Grade 5). Only in exceptional circumstances will a decision be taken to halt pay progression. More detail is outlined in the Trust's Pay Policy.

Staff will be informed about individual pay progression annually.