

## **GwE Staff Performance Management Policy**

All GwE staff will undertake an annual Performance Management (PM) in the autumn each year. This will then be reviewed on a quarterly interim basis to monitor progress to-date towards the targets and objectives agreed in the annual PM. The quarterly performance management reviews should be aligned with the quarterly monitoring of the GwE Business Plan priorities and provide an opportunity to reflect on personal performance and key achievements so far. It will also be an opportunity to review and amend the current objectives if needed.

*\*\* please note – in relation to any ‘Unattached staff’ on secondment to GwE the PM process will need to follow and comply with the LA policy relevant to the member of staff and the LA they have come from.*

The PM for staff will be aligned to the GwE Business Plan. In respect of Support Improvement Advisers, the PM targets agreed will also include specific targets for school improvement relative to the schools that they support.

### **1. Purpose of PM**

PM meetings are firmly designed to discuss and review employee performance to-date and recognise achievements. It is the opportunity to identify specific targets for employee’s contribution to achieving GwE objectives and priorities feeding GwE Business Plan targets and identify any support needed to meet those targets.

It is an opportunity to consider how the appraisee reflects GwE’s service and personal values which include:

- Trust;
- Show no bias;
- Fairness;
- Respect diversity;
- Supportive and collaborative;
- Bilingual;
- Objectivity;
- Demand high standard;
- Integrity.

It is also an opportunity to consider how the appraisee contributes to meet GwE’s minimum expectations which are:

- Good leadership and management;
- Good teaching;
- Eradicate in school variation;

## GwE policy for PM Autumn 2017

- None of GwE schools to feature in Estyn statutory categories;
- Pupils' learning and wellbeing at least good; and
- Successful Futures in place

The appraisee should also be continually developing their own role within the GwE structure. The performance management is an opportunity for the post holder to agree with their line manager on aspects of the role or portfolio that they want to further develop. This can then be included in the job description. Any amended job description should then be shared with the GwE Business Manager.

PM will take place on a one to one basis with staff member and line manager. In advance of the meeting a Pre-PM review will be completed by the appraisee and sent to the line manager 5 days in advance of the agreed one to one PM meeting.

### **2. Preparation for the PM**

#### **Individual staff preparation**

Dates for the one to one Review to be agreed at least 2 weeks in advance of the meeting. Staff will be required to complete a Pre-PM review to enable them to reflect on their performance over the last 12 months and identify strengths and areas for improvement.

The areas for reflection include:

- **Current Job description imperatives**
- **Performance against agreed targets**
- **Other relevant accomplishments**
- **Supporting school self-evaluation and improvement**
- **Building effective support and intervention**
- **Developing school leadership**
- **Building school to school capacity**

The appraisee should also consider the following:

- **What contribution has been made to meet 2020 GwE Objectives?**
- **How does the appraisee reflect GwE values?**
- **What has been the contribution to meet GwE's minimum expectations?**
- **How is the appraisee continually developing their own role within the GwE structure?**

The Pre – PDR Review is to be sent to the line manager 5 days in advance of the one to one meeting.

**Line manager's preparation for the annual PDR Review needs to include the following:**

1. Ensure PM date for meeting is agreed 2 weeks in advance of meeting and send Pre-PM review to employee explaining its purpose and requesting it is submitted back to you at least 5 days in advance of the PM meeting
2. Collate school data to identify impact of staff member intervention on school improved performance (when relevant)
3. Collate evidence relative to previous targets or key performance indicators of the job role
4. When relevant, reflect on the member of staff's performance against national standards including:
  - Supporting school self-evaluation and improvement
  - Building effective support and intervention
  - Developing school leadership
  - Building school to school capacity
5. Review and summarise key aspects of one to one meetings throughout the year
6. Consider any feedback you have received from customers, colleagues about member of staff performance
7. Consider results of any surveys that may be relevant
8. Review performance against previously agreed targets and specific targets in Business Plan that staff member has some or all responsibility for

**Carrying out the PM Review meeting, and completion of PM record**

1. Explain the purpose of the PM which is:
  - a. To discuss performance and progress over last 12 months relative to job role
  - b. Recognise achievements and accomplishments
  - c. Review progress against identified targets
  - d. Agree any support for future performance and to achieve targets

GwE policy for PM Autumn 2017

2. Refer to the Pre-PM completed by the appraisee and discuss its contents, in addition:
  - a. Use Open questions to elicit more information which will allow judgements on performance to be made
  - b. Probe for more detailed answers to demonstrate performance
  - c. Refer to areas of specific responsibility if relevant.
  - d. Overall, give open and honest feedback, both positive and developmental needs
  
3. Refer to evidence collated in advance of meeting in particular:
  - a. Achievement against previously agreed targets
  - b. Performance of schools relative to support delivered by staff member
  - c. Business plan actions and responsibility
  - d. Feedback from colleagues and school surveys as relevant
  - e. Aspects of one to one meetings throughout the year
  
4. Identify and agree targets or objectives for next year. They should be relative to the Business Plan and include targets for School Improvement that are specific to the appraisee. Ensure they are SMART targets:
  - **Specific** – state the outcome
  - **Measurable** – detail what the evidence of the achieved outcome will be
  - **Attainable** – employee is capable of achieving the target
  - **Relevant** – relative to business and job role
  - **Time bound** – when does it need to be achieved?

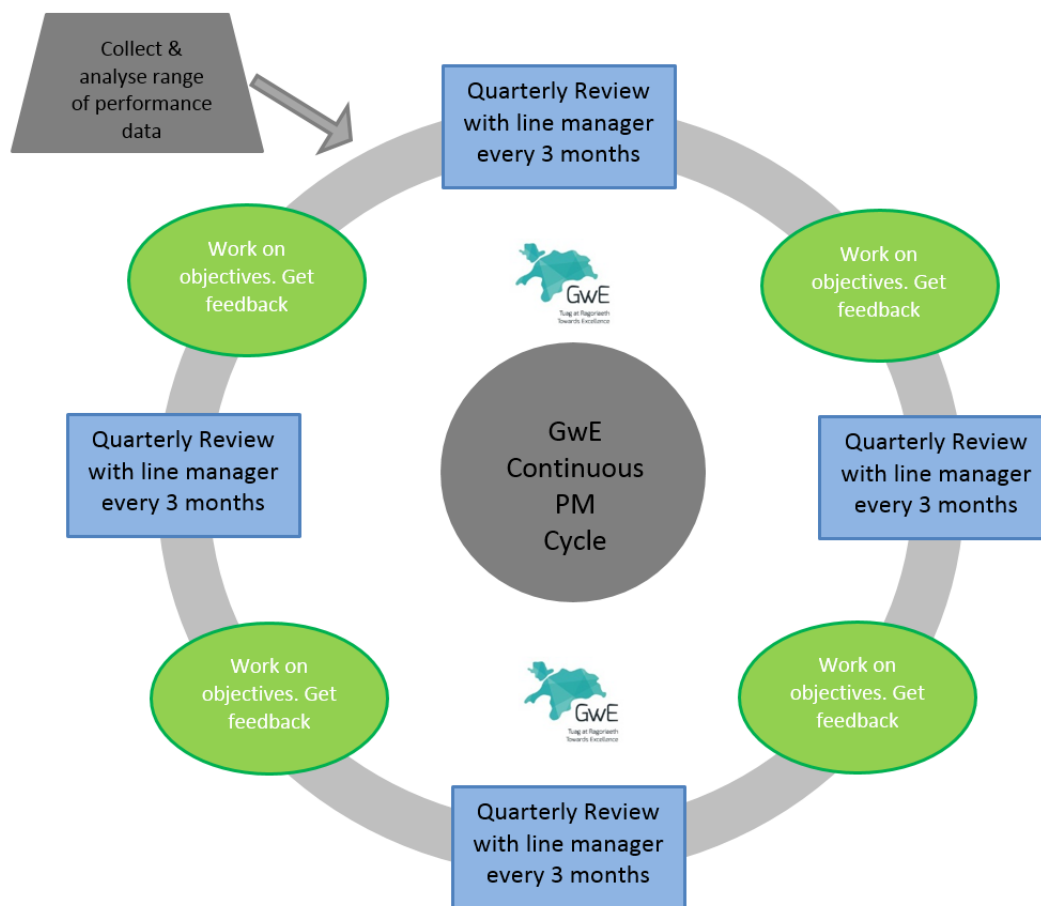
Usually, three objectives will be set but occasionally this may vary when there is an agreement between the appraisee and the line manager. The objectives set should fall into one of these three categories:

- A Regional objective that derives from the Business Plan
  - An objective that derives from the appraisee's day to day work and, when relevant, may include a school or group of schools
  - An objective that derives from the appraisee's self-assessment / peer assessment
5. Identify any staff development/CPD relative to supporting member of staff in achieving identified targets
  
  6. Complete PM review record and Action Plan sign and send to appraisee **within 5 working days of the PDR meeting** and request signature and return within one week

GWE policy for PM Autumn 2017

7. Ensure agreement of the first quarterly interim review date and where possible the review dates for the whole year
8. All PM documentation to be countersigned by appraiser and copy to be sent to MD as electronic record with confidential, restricted access

**Continuous PM Cycle**



**Quarterly Review**

A 1:1 meeting between employee and their line manager where they will typically discuss:

- Progress against existing objectives
- Personal development
- Priorities
- Issues or concerns
- Amend current objectives or add new objective with agreed training or support