Performance Management Policy

(Support staff)

Penpych Community Primary School
Ysgol Gynradd Gymunedol Penpych

Policy Leader	**: Mr O Gwilim**
Head teacher	**: Mr T Lewis**
Chair of Governors	**: Mr M Cude**

Policy applies to Academic Year 2026 -27

Signed HT: **Date: September 2026**

Signed CoG: **Date: September 2026**

This plan is a:	**School Plan using LA & WG guidelines**
This plan is a:	**Statutory Document**
Policy / Document Leader:	**Mr O Gwillim**
Link Governor:	**Mrs T Morris**
Key Personnel in Plan	**Headteacher, SMT**
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Reviewed by	**Policy committee**

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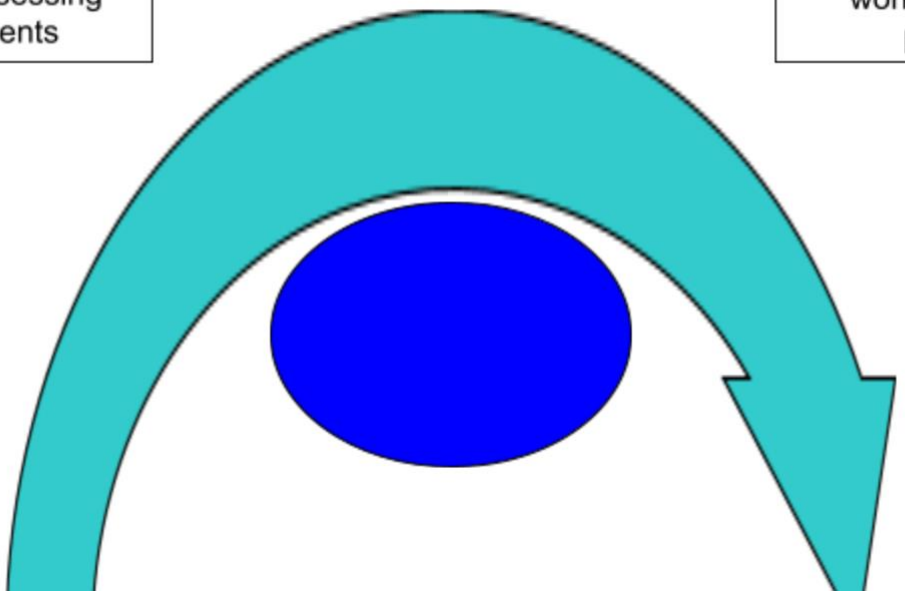
Performance Management Review, Planning and Monitoring

The review meeting
End of previous cycle progress, assessing achievements

The planning meeting
Agreeing new objectives, work development plans/CPD



Review progress throughout the year keeping professional dialogue on-going and to include mid-year review if applicable

1. Introduction

1.1 This procedure sets out the performance management arrangements for support staff of (insert name of School). It has been agreed by the governing body, headteacher and local authority and follows consultation with all staff members and recognised trade unions. It describes the purpose, procedure, roles and responsibilities that will ensure that the schools performance management arrangements contribute to the development of its staff and to the achievement of wider objectives for the school and its pupils.

1.2 This guidance document sets out a model process for the review of performance of support staff in schools. For the purpose of this document the term support staff applies to all school employees who ***are not*** employed on teachers' pay and conditions. The procedure does not apply to staff employed by an agency, staff undergoing their probationary period. It may be suspended during formal capability or disciplinary procedures.

1.3 Any person carrying out a performance management review is known as an **'appraiser'** and the member of staff being reviewed is the **'appraisee'**. The Headteacher may be the appraiser or they may appoint an appraiser for each member of staff.

1.4 If appropriate, the performance review process may be undertaken on a team basis – please refer to section 4.

1.5 The headteacher will provide the governing body with an annual written report on the operation and effectiveness of this policy including the training and development needs arising from the performance management process.

1.6 The process (meetings, letters, hearings and/or discussions) outlined with this Policy is available in English, Welsh or bilingual formats, upon your request.

2. Principles underpinning performance management

2.1 Performance management provides a way of supporting staff to contribute to the success of the school. It is vital that all staff are made aware of the aims of the school including information such as the School Improvement/development plan and that each staff member understands how they contribute to the overall success of the school in delivering a positive learning environment for pupils.

2.2 The following principles will underpin our performance management arrangements:

2.2.1 trust, confidentiality, open and honest dialogue between appraiser and appraisee;

2.2.2 consistency and fairness for all staff;

2.2.3 recognition of strengths and a commitment to support development;

2.2.4 a commitment to provide constructive feedback on performance;

2.3 The Governing Body is committed to ensuring that the performance management process is fair and non-discriminatory.

2.4 The Performance Management process should be conducted during the normal working hours of the staff member.

3. Timing of the performance management cycle

3.1 It is recommended that the performance management review takes place once a year and ties in with the academic year. It is therefore appropriate that the review, planning and objective setting processes are conducted in either July or September. This will allow time for the Headteacher to consider training provision for the new academic year. It is important to be committed to ongoing discussions about performance throughout the year and you may wish to have a formal mid year review session so that you can review progress and any development needs.

4. Team Performance Review

4.1 If it is deemed appropriate and there is consensus of all staff, you may adapt the process to reflect a team performance review. This may be more suited for jobs which have more generic tasks/responsibilities, e.g. mid-day supervisors/cleaners.

4.2 For a Team Review the procedure and forms provided should be used and should include input from all team members. Any reference in this procedure/documentation to Appraisee should be amended to reflect Team input.

4.3 If a team member identifies an individual training need, this must be recorded and implemented accordingly.

4.4 If a team member requests an individual performance management review, this must be provided for.

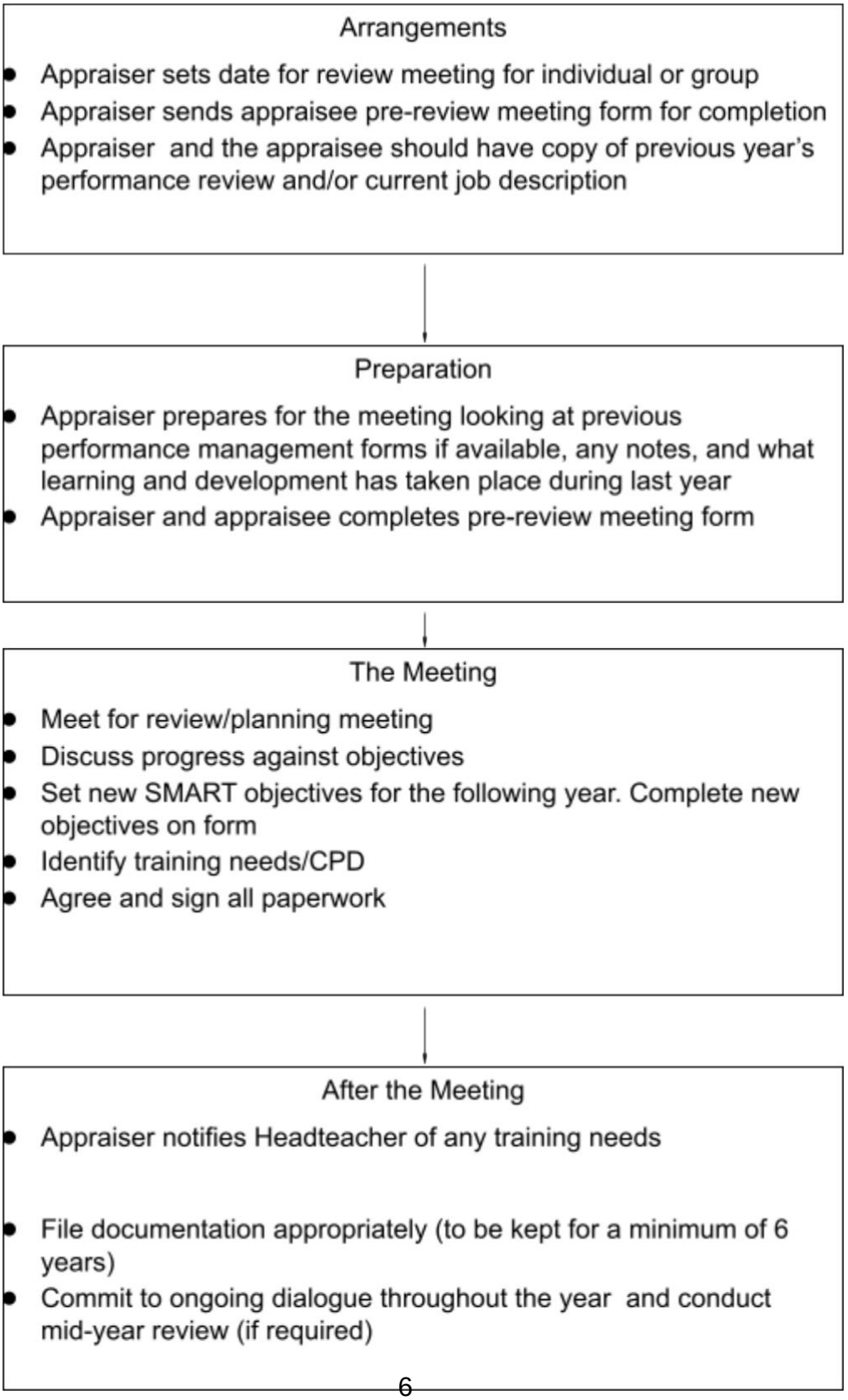
5. Professional Learning Passport

5.1 The Professional Learning Passport (PLP) is an online portfolio available exclusively to Education Workforce Council registrants. The Passport is a free tool, funded by Welsh Government, developed to support your personal and professional learning, with the aim of improving your practice and the outcomes for learners.

5.2 Whilst it is not compulsory, staff who are required to register with the EWC are encouraged to maintain their PLP via the EWC site and to consider using it to support their development needs as part of the Performance Management process.

Performance Management Review Flowchart

- If conducting a team review, they may complete the documentation together



The Performance Management Review

Steps Step 1: The Arrangements

Performance management should be conducted in a setting that ensures privacy and allows sufficient time for a thorough discussion.

Step 2: Preparation: Before the review/planning meeting

The performance management pre-review meeting forms should form the basis of the discussion between the appraiser and the appraisee together with any previous review documentation.

This will include:-

- successes/achievements over the last year against previous objectives
- factors that have helped and hindered achievements
- assessment of any training/development over the last year
- identification of future key objectives linked to job role
- future training and development needs
- any career goals

Step 3: Completing the review/planning meeting

1. **Review of objectives and performance** – Note key accomplishments and factors that have hindered or helped achievements
2. **Employee development** – Discuss the developmental progress since the last review, the training development opportunities that have been undertaken and their effectiveness.
3. **Objective setting** – as part of the formal review the appraiser and the appraisee will agree new/continuing objectives for the next review period. These are completed on the performance management planning and review statement (copy attached)
4. **Additional notes/ comments** - should include any other actions arising, including, where appropriate actions by the manager to support performance management
5. **CPD/training and development needs** – should be jointly identified and noted on the separate Training and Development Needs/CPD form (copy attached)

Should there be a disagreement between the appraiser and the appraisee about the performance outcomes which cannot be resolved by discussion, the appraisee may make a note on the Performance Management form.

Step 4: After the review/planning meeting - completion of the documentation

The appraiser and the appraisee must agree new objectives and assessment methods based on the performance management review cycle that has just

ended including factors that have helped and hindered achievements, training requirements and career goals.

The appraiser will have five days to complete form and submit to the appraisee for them to sign/comment. The appraisee has five days in which to do this and return to the appraiser. If the appraisee disagrees with any aspect of the review, they may note this on the form

The appraiser and the appraisee should each retain a signed copy of the completed performance planning and review statement form and the CPD form. All documentation will be confidential and kept for a minimum of 6 years in the school.

Any correspondence issued by Council Officers will be issued in the language preference of the employee (Welsh or English).

Performance management review - checklist for the appraiser and the appraisee

Before the meeting

Appraiser:

- schedule the review meeting, allowing appropriate time
- book meeting (private, enabling confidentiality and free discussion)
- ensure all documentation is available including previous Performance Review documents if available.
- give copy of pre-review form to appraisee to use for own self-assessment and ensure the appraisee is clear about its use and the key areas to include on it
- ask appraisee to consider areas for new objectives
- ensure that you consider the appraisee's achievements in light of any known disabilities and any reasonable adjustments you have made to support them in their work.
- undertake initial assessment using pre- review meeting form in order to review performance against objectives, behaviours, strengths, weaknesses and anything that may have impacted on the appraisee's performance
- consider potential objectives relevant to the job holders contribution to the schools aims
- ensure that you have considered protected characteristics implications in identifying potential objectives
- consider development needs and how they may best be met

Appraisee:

- prepare documentation for review meeting: notes from previous meetings/supervision; evidence relating to achievement against objectives; areas of success/failure; areas for continued development; information from EWC Professional Learning Passport if applicable; thoughts on career development
- complete the pre-review meeting form
- consider what new objectives may be appropriate in the context of school priorities/aims
- consider development needs and how they may best be met

Checklist – during the meeting

Appraiser:

- start with the appraisee's self-assessment
- identify and agree areas of clear agreement. Focusing initially on positive outcomes

- discuss other areas and identify clearly the basis on which you have made your assessment
- identify new objectives for the reviewee and agree relevant success measures. A maximum of 3 objectives is recommended
- agree priorities for any training/development and who will take action to progress
- discuss whether the employee has a disability as defined under the Disability Discrimination Act, agree and record any reasonable adjustments
- schedule any future review sessions relevant to the role or mid-year reviews

Both:

- share feedback and make every effort to agree on outcomes as part of the performance management discussion

Checklist - after the meeting

Appraiser:

- complete the planning and review form along with the training and development needs form and pass to appraisee within 5 days of the meeting
- appraisee has 5 days to sign the review form and return it to appraiser. The appraisee may make any additional comments on areas that were not agreed.
- send planning and review form to the headteacher within 10 days of the planning meeting taking place
- ensure the forms are signed by the appraisee and the appraiser
- provide copies of the form to the appraisee
- ensure that copy is kept in a confidential place – this is important so as not to breach the Data Protection Act.

  Any correspondence issued by Council Officers will be issued in the language preference of the employee (Welsh or English).

Performance Management Pre-Review Meeting Form

This form can be used by the appraiser and appraisee to help them prepare for the performance management meeting.

(If a Team review is being conducted, staff may complete this together)

Appraisee Name	**Job Title**

What were the key successes/achievements over the last year based on previous objectives if available?

Was there anything that helped achievements over the last year?

Was there anything that hindered achievements over the last year and are there any possible solutions?

Were any training/development opportunities undertaken over last year and if so what was achieved/how successful were they?

Are there any School priorities and possible future key areas to work on linked to job role?

Are there any further learning and development requirements?

Are there any future career development opportunities and how could these be achieved?

PERFORMANCE REVIEW AND PLANNING STATEMENT

APPRAISEE NAME: ……..

JOB TITLE: ……..

Progress on previous objectives

Objective	Assessment/Progress/notes

Did anything help /or hinder progress

How well did any training/development interventions assist development?

Training/development activity	Success

Any additional comments

Objectives for next year

Objective	Success criteria/timescale	Monitoring method

SIGNED/DATED: APPRAISEE _____

SIGNED/DATED: APPRAISER _____

APPRAISEE NAME:

JOB TITLE:

Training and Development Needs/ CPD

Training/development need	Action to be taken

Signed/dated
Appraisee ----------

Signed/dated
Appraiser ----------

Whilst it is not compulsory, staff who are required to register with the EWC may wish to consider updating their Professional Learning Passport with details of training/development undertaken.