

Performance Management for Support Staff

Questions and answers

Q How do I review and assess the performance of someone who has changed jobs during the workplan year? Also, what does this mean for incremental award?

A If an employee changed post during the workplan year:

- An assessment of performance in that post should be made against the relevant workplan objectives
- A new workplan should be developed for the new post.

If staying in the new post at time of incremental award, performance and incremental award should relate to achievement of objectives on the existing workplan.

If returning to original post – e.g. return from secondment – the assessment of performance in the original post should inform level of pay (including incremental award) which the employee receives on return.

Q What do I do if the work originally included in the workplan is no longer required?

A The Manager should brief the employee on the situation and develop a revised workplan with the employee. An assessment of performance in the objectives being discontinued should be made and recorded. Replacement objectives should be set. If possible, the employee should be able to demonstrate achievement of the replacement objectives before the annual review meeting (February).

Q What if objectives are not SMART?

A If original objectives are found not to be SMART, they should be revised ('SMARTed') with the employee at the earliest opportunity.

Q What if additional objectives are needed, for example to deal with new projects?

A If additional objectives are set it is preferred that there is time for them to be achieved prior to the annual performance review. If not, that the employee is clear that any incremental award related to the achievement of this objective will be considered at the end of the workplanning year in which the achievement takes place.

Q What if the employee disagrees with my assessment of performance?

A The employee will have a 'Right of Appeal'. Further details appear in Guide for Managers.

Q How do I review and assess the performance of someone who is on maternity leave or pregnancy/disability related/long-term sick leave?

A Please refer to the Guide for Managers. Managers should ensure that, when employees return, workplans are revised if, and as, appropriate. This will support effective performance review.

Q What if the school wishes to have the performance management cycle based on the school year (September to August) rather than the financial year (April to March) ?

A A school may if they wish have the performance cycle based on the school year. If incremental progression will apply within the grade, the contractual incremental date will be the 1st April in each year.

Q Can I refuse an increment on the basis of an employee's sickness record if I haven't applied the sickness management scheme to them?

A. The fundamental purpose of the Performance Management Scheme and the Sickness Procedure is to seek improvement and not to punish. The Performance Management Scheme does not remove the need for managers/ supervisors to apply other personnel policies designed for the issue in question (sickness, discipline, and capability). If the sickness record alone meant an increment was refused and the sickness management scheme had not been applied it is likely that an employee would have an appeal upheld.

Q How can an 'annual review' be carried out 11 months (i.e. February) into the workplan year?

A The Manager/ supervisor should make a fair prediction of performance until the 31 March taking into account performance up till the February annual review meeting.