



Performance Management – Support Staff Federation

Updating Policy Procedure

When a policy is due for review it will be emailed to the reviewer who will revise and highlight those updates and return the policy in full with the highlighted updates back to the Policy Co-Ordinator.

When a policy reviewer becomes aware of any updates they will ask the Policy Co-Ordinator to email the policy to them and follow the above procedures.

A policy is a statement of intent and the guidelines we follow, that is adopted by the Fortuna and Athena Federation's Governing Body.

Policy Reviewed by:

Craig Chaplin – Fortuna
Chris Mills - Athena

Updated on:

05.02.2026

Date to be reviewed:

January – April 2028

Date Ratified at FGM:

18th May 2026

Performance Management for Support Staff Policy

Performance Management for support staff is a process designed to support the development of staff in order to continually improve professionally, raise standards and drive whole school improvement.

The Fortuna and Athena Federation's policy is intended to ensure that each member of staff's performance is reviewed and targets set on an annual basis and that an exchange of views will take place between the jobholder and their line manager.

This policy and its detailed procedures have been written following guidelines from Lincolnshire County Council's Appraisal Policy and Procedure

This policy aims to create a performance management framework to ensure that all employees:

- Have an annual appraisal meeting.
- Know what is expected of them in terms of the standard of their performance from the beginning of their employment.
- Know what is required of them in order to do their job effectively.
- Receive recognition for their achievements.
- Receive feedback on a regular basis which aims to improve and develop their performance.
- Identify areas where improvement is needed.
- Identify with their line manager their learning and development needs.
- Plan their career development where possible.

The benefits of performance management in terms of improved communication and enhanced performance, both for the individual and the Fortuna and Athena Federation, will only be achieved by the continuous commitment of all those involved to the process.

The performance management framework at the Fortuna and Athena Federation has been designed to meet the following specific objectives;

- To ensure the school development priorities and corresponding actions are met.
- To assist staff in performing their roles to the best of their ability and maximise their contribution to the school's overall objectives.
- To identify individual training needs.
- To highlight the potential that everyone has to develop within their current position or for another role.

The Performance Management Cycle

The process involves a three - stage annual review cycle

Stage 1 - Planning

The cycle commences with the line manager giving out the performance management policy for support staff including the pay and staffing policy.

Stage 2 - The Interview

The annual performance management interview is an opportunity for the jobholder and line manager to plan and agree the individual's performance objectives for the forthcoming year.

There will be a discussion with his/her line manager, which will inform them of the Fortuna and Athena Federation objectives and priorities for the fourth-coming year. Within this the line manager will outline a target related to pupil progress and standards and a target for professional practice. These will both be taken from the School Development Plan and apply to all teaching and non-teaching staff. The final target will focus on the professional development of the jobholder within their current post within the school.

In the same discussion the training and development needs for the individual should be discussed and documented.

New employees joining the school part way through the year should aim to complete some initial objectives within 6 months of commencing employment. Line managers will ensure the objectives agreed can be realistically progressed in the remaining time left for that reporting period.

Where there are differences of opinion between the line manager and the individual in assessing performance and setting objectives, either party may seek advice from an appropriate senior manager (see Complaints).

The Performance Management Interview proforma is used to document the results of the discussion and where appropriate forwarded to individuals identified on the proforma for action.

Stage 3 - Monitoring

During this phase a member of the senior leaderships team or HLTA/Senior TA will undertake regular informal meetings and carry out monitoring activity to ensure an informed judgement of performance and progress against the agreed objectives by the end of the year.

The performance management of the HLTA will be carried out by a member of the senior leadership team.

Line managers and post holders are encouraged to have review meetings during the year. These may be formal or informal. Usually these meetings will be brief to allow a quick "pulse check". If more time is required a more formal meeting should be arranged to discuss progress, amend any objectives and/or arrange training or support.

The designated member of the Senior Management Team responsible for Staff Development will monitor objectives to ensure that common standards are applied and that whole-school training needs are addressed.

Individuals are encouraged to keep a record of their own professional development, agreed objectives, courses and training undertaken in their own CPD files.

Stage 4 - Reviewing Performance

At the beginning of the annual Performance Management Interview both parties will discuss the previous year's objectives and assess performance against these objectives.

At the end of the interview the line manager will complete a written review and record the new objectives. This is to include any formally identified training and development needs.

If it is not possible to complete the statement at the meeting it must be completed within 10 working days of the meeting. The appropriate copies of the review should be forwarded to those identified on the proforma. Copies of the paperwork will be held on the employee's personnel file for reference.

Performance reviews are much more than simply filling in forms. It provides an important record and it is essential that it is completed accurately. Above all, however, development and performance improvement is viewed as a continuous process contributing to meeting the aims of the school.

Performance reviews will be completed by the end of February.

Complaints

Within 10 working days of receiving a review statement:

Individuals can record their dissatisfaction with the line manager.

Where a resolution cannot be agreed between the line manager and individual, the individual may refer the matter to the designated member of the Senior Management Team.

Where designated member of the Senior Management Team the individual is the line manager, the individual may raise the issue with the Head of School.

The designated member of the Senior Management Team or Head of School will investigate the matter and take account of comments raised by both parties.

The review of the complaint should be undertaken within 10 working days.

The designated member of the Senior Management Team or Head of School may decide that the review should remain unchanged or may add observations of his/her own which should then be relayed to the individual and line manager involved

If the matter is still unresolved the case can be referred to the Chair of Governors if the Head of School has carried out the initial review.

Any new review, or part review, should be conducted within a further 15 days.

The complaints procedure does not remove an employee's right of recourse to the grievance procedure at any stage