

Performance Management for Teaching Assistants/Learning Mentors

Performance management offers:

- An opportunity to reflect and to review your progress and development
- An opportunity to ask yourself and your team leader ‘How am I doing?’
- An opportunity to consider and celebrate your role in raising standards and in meeting the targets in the departmental action plan
- An opportunity to consider where you are going in your career
- A discussion about any areas for development
- An opportunity to set targets
- An opportunity to identify any training needs
- A forum to provide information for management

Self –Review

A self-review should include:

- Strengths and weaknesses in performance in working with pupils (where appropriate)
- Curriculum understanding (where appropriate)
- Behaviour management
- Relationships with other adults in or connected with the school
- Any additional contributions made to the life of the school
- Any appreciation and critical comments received from others
- Thoughts for the future:
- Training and professional development opportunities in and out of the school
- Career progression

The Process

- Self- review by the support staff
- Progress review by the line manager/team leader, based on objectives set at the last performance management review
- Observations on performance of the support staff
- Discussion – two way
- Setting targets and timescales
- Agreeing competencies – what does a good performance look like?
- Setting dates for interim activities – e.g. observations, progress meetings
- Agreement on action required to meet the targets, including training and professional development opportunities
- Setting the date for the next review
- Completing the review form and signing it

Background Documents

For the review:

- Most recent job description
- Previous performance management review
- Current objectives

PERFORMANCE MANAGEMENT REVIEW MEETING

For your Performance Management Review meeting you will want to:

- Plan your Performance Management Review meeting in advance and think about what you have done since your last review and what you want to achieve. The Performance Management Review Preparation guidelines are designed to help you to this

PERFORMANCE MANAGEMENT REVIEW PREPARATION GUIDELINES

The preparation sheet is to help you think about what you have done since your last review and what you want to achieve in the coming year

THE PAST YEAR'S WORK

Describe the aspects of your work with which you are most pleased this year:

How have you met the objectives agreed at your last review?

Which objectives did you find most challenging and why?

What, if anything, caused you problems in performing your job and why?

Looking back, what have you learnt this year?

THE COMING YEAR'S WORK

What improvements would you like to make in your work and achieve in the coming year?

How will you make this happen?

What will you need to learn in order to achieve this?

How could your Team Leader help?

Are there any other matters you would like to talk about?

PERFORMANCE MANAGEMENT REVIEW PREPARATION SHEET
Line Manager

This preparation sheet is designed to help you think about what your member of staff has done since their last review meeting and what you want them to achieve in the coming year

THE PAST YEAR'S WORK

Describe the aspects of their work with which you are most pleased this year

How have they met their objectives agreed at the last review?

What objectives did they find most challenging and why?

What, if anything, caused them problems in performing their job and why?

What training and development opportunities did they undertake this year?

THE COMING YEAR'S WORK

What improvements would you like them to make in their work for the coming year?

How will they make this happen?

What will they need to learn in order to achieve this?

How could you help them?

Any other matter/s you would like to talk about?

**PERFORMANCE REVIEW / ANNUAL APPRAISAL
FOR SUPPORT STAFF**

CONFIDENTIAL

Name

Position

Team Leader

Date of review

Name:	Name of team leader:	Starting date in job:
Position:	Department:	Date of review:

SECTION 1 PERFORMANCE ASSESSMENT

To be prepared by the Team Leader

Indicate your assessment for the employee you are reporting on by placing an 'X' in the columns provided below. Remember you are reporting on the past year's performance. The reporting categories are:

1 = Outstanding 2 = Good 3 = Satisfactory 4 = Inadequate 5 = Requires development and experience

Assessment (as appropriate to post)	1	2	3	4	5	Comments
1. Supporting teachers and pupils						
2. Output of effective work						
3. Flexibility						
4. Dependability						
5. Energy and enthusiasm						
6. Ability to learn quickly						
7. Ability to think quickly						
8. Does the employee show an interest in school activities/procedures?						
9. Efficiency						
10. Ability to get on with others						
11. Spoken communication						
12. Capable of effective unsupervised work						
13. IT literacy						
14. Typing skills						
15. Punctuality						
16. Personal Appearance						
17. Timekeeping						
18. Attendance						

Agreed objectives 2007-2008	Met	No/Incomplete
1.		
2.		
3.		

SECTION 2: COMMENTS

To be prepared by the Team Leader

Please comment on the reviewee's overall contribution during the past year and how this may be developed positively. Where appropriate, objectives set and agreed should be summarised in Section 4.

SECTION 3 REVIEWEES COMMENTS

This is the opportunity for the reviewee to express their views on their job and their working environment.

Question	Comment
What have you liked most about your job over the past year?	
What have you liked least about your job over the past year?	
How do you think your job could be improved?	
Where do you see yourself in three years time?	
How can the Academy help you achieve your aims?	
Have you any other comments?	

SECTION 4

Agreed objectives	Review date
1.	
2.	
3.	

For the Team Leader: Please sign below once you have prepared the report, held the performance review and discussed this report with the reviewee.

Employee's signature _____

Team Leader

Name (block capitals) _____ Signed _____ Date: _____

Skills List

Not all the skills and performance indicators are required in each job / employee

Supporting teachers and pupils	Acknowledges and appreciates their needs; Understands how support staff contribute to raising achievement Acts courteously and attentively at all times; shows initiative and urgency in problem solving;
Output of Effective Work	Produces error free work at or above average pace.
Flexibility	Responds willingly to varying demands of pace and to new approaches to work; Can and does work in more than one area of the department.
Dependability	Produces results working without additional supervision. Carries out work without prompting. Displays integrity.
Energy and Enthusiasm	Shows effective energy levels throughout the day. Shows enthusiasm for work. Welcomes challenges. Thinks positively.
Ability to learn quickly quickly	Learns, remembers and uses new information and skills. Displays an open enquiring mind.
Ability to Think Clearly	Gets to grips with an issue and generate ideas; Makes an effective decision quickly and takes a balanced view.
Ability to get on with/lead others	Shows an understanding of others' points of view. Accepts and acts on constructive criticism. Manages conflict constructively. Works willingly within a team. Liaises effectively with external agencies. Leads in their area of responsibility (HLTA)
Spoken communication	Speaks clearly, concisely and does not use jargon; Uses the telephone effectively.
Capable of effective unsupervised work	Where appropriate.
IT literacy and Typing skills	Assessment of software knowledge and keyboard skills
Punctuality	Is punctuality acceptable for the role e.g. is they on time for meetings, etc?
Personal Appearance	Appropriately dressed for the job?
Timekeeping and Attendance	Is timekeeping acceptable e.g. are they on time for work; Attendance at work – is this acceptable for the role?

Note: Those with HLTA have those standards as guidance in addition