

# muckle<sup>LLP</sup>

## Being brilliant at managing staff performance

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# Summary



- Benefits of having a brilliant performance management programme for all staff
- Best practice and practical tips on managing a brilliant performance management process
- Tackling poor performance
- Case study

# Benefits (1)



- Ofsted focus on quality of leadership in and management of the school
- Inspectors should consider
  - how effectively senior and middle leaders use performance management including:
    - effective development of senior and middle leaders and succession planning
    - evaluation, monitoring and improvements in teaching
    - extent to which underperformance is tackled

# Benefits (2)

- Excerpt from outstanding grade descriptor (quality of leadership in and management of school)
  - *“Leadership focus relentlessly on improving teaching and learning and provide focussed professional development for all staff...This is underpinned by searching performance management that encourages, challenges and supports teachers’ improvement. As a result the overall quality of teaching is at least consistently good and improving”*

# Benefits (3)



- Right team is critical to a school's fortunes – not just teaching staff – role to play in school improvement plan
- Helps people feel valued and motivated
- Retention / recruitment
- Identifies talent and gives opportunities to grow linked to career aspirations
- Succession planning

# Benefits (4)



- Identifies weaknesses and provides framework to support development
- Gives opportunity to tackle underperformers and hold people to account
- Helps ingrain the "ethos" of the school improvement plan across the school – common purpose

# Best practice – appraisal meetings (1)



- Appraisal and capability procedure
- Careful forethought and planning
- Deal with over short time space – concentrated and not drawn out
- Quality time – consider time, location, venue
- Constructive feedback throughout the appraisal cycle, not solely reserved for formal meetings
- No surprises!

# Best practice – appraisal meetings (2)



- Appropriate people to manage performance
- Training
- Paper trail
- Be consistent



# Best practice – setting objectives



- Clarify expectations by clear objectives – SMART?
- Standards / Career aspirations / areas for development / job description / pupil progress
- Two way process
- Self evaluation / reflection
- Professional development opportunities
- Continual review

# Tackling poor performance (1)



- Raise concerns as they arise
- Informal reviews
- Constructive feedback – coaching / mentoring / training / structured observations for teaching staff (HLTAs / TAs where appropriate)
- Deal with issues swiftly
- Appraisal and capability process dovetail – when should a capability process be considered?

# Tackling poor performance – what does the law require?

- Employer must show:
  - reasonable investigation to establish position
  - what was required of employee (clear objectives)
  - employee was aware of requirements
  - employee given time to improve and support where falling short
  - despite having a reasonable time to improve and support, employee falling short of requirements.

# Tackling poor performance (cont)



- Process requires clear objectives, performance measures and outcomes to be agreed at each stage
- Meeting process including right to be accompanied and right of appeal at each stage
- Reasonable time period to improve – what is reasonable?
- Ongoing consideration of training needs

# Tackling poor performance (cont)



- Alternative role?
- Audit trail to show procedural and substantive fairness
- Policy considerations
- Acas code of practice on disciplinary and grievance procedure
- Reasonable employer
- Settlement agreement?

# Case study



You line manage one of the school's administrative staff. This member of staff is approaching retirement age and there have been concerns for some time that she is “coasting” to retirement. Informal discussions arranged to encourage improvements in her performance have not been successful. The situation is becoming untenable as her colleagues feel like they are shouldering her workload. How would you deal with this?

# Case study (cont)



Following the performance monitoring and review period there are still concerns and she has already been issued with a final written warning.

The day after you invite the member of staff to a formal performance review meeting, she phones in sick. This is followed a few days later by a FIT note from her GP signing her off for 4 weeks with work related stress and anxiety.

Do you have to wait for her to return to work to continue to manage her performance?

# Training

- Employment Law – Back to Basics
- 2 day training
  - Nunthorpe Academy, Middlesbrough  
Tuesday 30 June & Thursday 2 July 2015
  - Muckle LLP, Newcastle  
Thursday 12 November & 19 November 2015





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