

JOHN TAYLOR MULTI ACADEMY TRUST



Guidance for Creating a Performance Management Plan (school version for support staff)

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Next review date: July 2028

This plan is only to be used where a formal written warning has been issued under the Capability Policy. It should be developed with you and your manager once a decision has been made to issue a formal written warning. This may be at the end of the formal capability meeting or shortly afterwards.

The purpose of the template is to:-

- Identify targets to help you reach the required level of improved performance
- Identify support measures, such as additional learning, development or supervision, coaching
- Identify timescales to enable you time to achieve improvement
- Agree dates to review your progress and the frequency of those reviews

This document should be updated every time you have a progress review meeting.

Therefore, a new “progress review section” should be added for each separate meeting so that you have a full record of actions, discussions and progress to date.

Timely completion of this plan gives the best opportunity to identify, clarify and seek access to the support you need to help achieve improved performance.

We do recognize that managing underperformance concerns can sometimes be stressful and can impact on your physical or mental health. Supporting your wellbeing is an integral and essential part of our approach, so we encourage you to access the range of support and information available, via the Wellbeing Hub on the VAULT. Some services can be accessed by self-referral or through discussion with your manager.

Nature of Underperformance

This section should clearly define what the areas of underperformance are and identify any causes (if known).

There should be clear detail of the tasks or areas of work where underperformance has been identified.

Examples could relate to:-

Time Management, Customer Service, Teamwork, Interpersonal Skills, Written Reports, Problem Solving or Leadership.

The areas will be unique to you and your role and therefore tailored to your individual circumstances.

There could be concerns raised about the volume of work, quality of work and/or frequency of errors.

There could be more subtle areas that may have fewer tangible objectives, such as an inability to effectively manage a team, effective leadership or communication skills.

As much detail as possible about the specific issues should be captured within this section of the template. The purpose is to ensure you have clarity on the actual tasks and areas of concern.

Expectations and Areas of Improvement required:

This section will detail what successful improvement will look like. To improve your performance, you need to understand what is being expected of you, in terms of a satisfactory level of performance. This will enable you to focus and work towards that. The plan should provide clarity on each area where an improvement is required.

The use of SMART (Specific, Measurable, Attainable, Relevant Timely) targets may be useful to clarify expectations.

S	• Goals or targets should be well defined and clear on what needs to be achieved.
M	• This is about how you know you have achieved the goal. This will help evaluation of achievements and progress. It could include quantitative measures, e.g. 'how much' or 'how many' or more qualitative measures, e.g. the way in which something is done, for example, client feedback.
A	• The goal should be challenging but still reasonable to achieve. Reflecting on this element can help identify any barriers that are needed to be overcome to achieve success.
R	• This is about making sense of the goal relating to a job function, and overall objectives of the service or business.
T	• This is identifying a target date or deadline. Be realistic in timeframes to achieve the goal. This may reflect the prioritisation against other targets.

Clear timescales against each specific area of work should also be detailed. There may be different timescales for different tasks and need to consider where agreed support is necessary and how this impact on timescales. You should ensure that you understand, and have agreed with your manager, what you are being asked to achieve by the next meeting.

Actions agreed to support improvement

This section should include detail of any key support mechanisms you and your manager have considered that might help you improve your performance. This might include reasonable adjustments, coaching, mentoring, learning and development. Details should be included as to who will take responsibility for arranging any additional support and indicative timescales for when this will be in place. Remember support required to assist you improve will be unique to you. There may be some support that you feel you need but which may not be reasonable for your manager to provide, perhaps due to significant financial costs or duration of retraining. Each situation will be considered on its own merits and be openly discussed with you and noted.

Where learning or development is agreed, you should consider your individual learning style, for example, whether you learn best through interactive sessions, visual tools, reading written materials. This should be factored into any support learning or development that is put into place, wherever possible. There should be a list of all the actions that have been agreed to support you and recap on any that have already been explored prior to the formal process, detailing why they may not have worked.

Progress Review Meetings

When you meet with your manager to discuss your progress via your Performance Management Plan, these will be referred to as 'progress review meetings'.

Every time you have a progress review meeting, notes of your discussions should be captured in a new section of the template form. This is essential to ensure you and your manager can see progress and keep the plan on track.

How many progress review meetings you have will be agreed as part of your individual improvement plan and will depend on the nature and impact of your underperformance.

Agreed Timescales

An essential part of your plan will be to understand what timescales apply. This will need to be set against the specific areas of work where there are concerns. There may be different timescales for different tasks depending on the role you are undertaking. If there are dates set for improvement these should also reflect the ability to put required learning development or other support in place and therefore be realistic. You will also discuss the frequency of your Progress Review meetings.

If you have been unable to improve your performance by the timescales agreed, it may be that your manager moves to the next stage of the formal process. However, if they feel this is necessary, they will discuss this with you as part of your ongoing meetings. They may also consider an extension to the improvement period.

If a next stage formal meeting to consider a further sanction is required, you will receive a formal invite letter with right to be accompanied. No sanction or escalation to a next level warning will take place during a Progress Review Meeting.