

Performance Management Policy

Issued March 2019

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About TalentEd

TalentEd is a registered charity, committed to delivering services that address the following objectives:

1. The advancement of education; and
2. The relief of those in need by reason of financial hardship or other disadvantage

We do this by supporting high ability students from low income backgrounds to help realise their full academic potential.

1. Introduction

1.1 Why we review performance

At TalentEd we systematically review the performance of all staff for the following reasons:

- Alignment – ensuring staff are aligned with TalentEd’s purpose and strategy
- Satisfaction – assessing how staff are progressing with objectives and holding staff accountable for performance
- Personal growth and Development – identifying areas of work, experience support or training, aligned to the needs of the charity, which enable the individual to reach their full potential.
- Progression – celebrating the development of staff as TalentEd grows.

1.2 Who is covered by this policy

All staff are responsible for their own performance and as such are the owners of the performance review process. Most staff will complete a performance review with their line manager, except for the Executive team, who will complete their performance review with a representative of the board of trustees. This policy does not apply to tutors, who, as contractors, are not employees of the charity and monitored under other arrangements.

1.3 Frequency of reviews

Unless agreed otherwise, performance reviews will take place every 3 months for staff in their first year of working for TalentEd, and every 6 months subsequently. The final review of the year will take place in July/August. A regular supervisory meeting between an employee and their line manager will take place to ensure that employees are able to access support on a regular basis and reflect on their progress.

2. The process of the performance review

All performance reviews will follow the same format as set out below and will be carried out using the Performance & Development Review Form. The Trustees may agree an alternative format with Directors.

2.1 Before the performance review meeting

The performance review is booked with the member of staff in advance. Both the member of staff and the reviewer reflect on the performance of the member of staff against the objectives and behaviours set in the previous review meeting (sections C&D). These previously agreed objectives and behaviours are transferred to section B for the review taking place. The member of staff adds achievements and any reflections against each of these objectives. The appraisee completes their achievements and reflections in section B adding some proposed objectives for the next period in section C, then returns the form to the reviewer at least 2 working days before the meeting takes place.

The reviewer should complete (on the form) their comments and return it to the employee to complete section C&D during the review meeting. Feedback will be collected from at least 2 stakeholders at the end of the probationary period and annually thereafter.

2.2 During the meeting

The staff member leads the performance review using the previously completed form to get clarity around the reviewers comments to section B before moving on to Section C. After discussion, the objectives will be agreed, specifying the support they need over the coming review period, as well as discussing this in the context of their long-term aspirations. Section D provides the opportunity to summarise and highlight key actions agreed in the completion of section C.

2.3 After the meeting

The employee finalises the form by including feedback from the appraiser and shares this with the reviewer. The appraiser has the opportunity to make any final comments before both sign to confirm that it is an accurate record.

The final document is scanned/PDF by the employee. A copy retained by the employee and in the charities HR records.

If there is any disagreement between the reviewer and member of staff that cannot be resolved between them, the member of staff has one right to appeal. Any appeal should be in writing to the reviewer's line manager or, where this is not possible, a nominated member of the board of trustees.

The outcomes of performance review will be considered at annual salary reviews (see TalentEd salary policy).

3. What we mean by objectives and behaviours

Objectives should be based on an employee's job description and the strategic plan so that they align with the wider aims of the organisation. They provide a link between the job of the individual and the charity's purpose and vision, giving an employee some wider context for the work they are doing.

Objectives are 'what' you will do and should link to the priorities of the charity as set out in the strategic plan, implementation plan and scorecard. They do not describe your routine work but instead highlight improvements or desired progress. Objectives should be SMART:

- **Specific** – objectives should state a desired outcome. What do you need to achieve?
- **Measurable** – how will you and your reviewer know when an objective has been achieved?

- **Achievable** – is the objective something you are capable of achieving but is also challenging?
- **Relevant** – do objectives relate to those of the team/department/business?
- **Timebound** – when does the objective need to be achieved?

Objectives will typically refer to outputs, such as:

- The **number** of new tutors recruited by the end of the term, e.g. to recruit 30 new tutors in Birmingham by the start of the January term.
- The **time** it takes to process invoices, e.g. to reduce time spent on processing invoices by 25% by January by implementing new accounting software.
- The **impact** of a programme, e.g. to improve the percentage of students improving in all outcomes by 25% by the end of the programme by ensuring every tutor receives support and a CPD opportunity each month.
- The **money** that is generated through funding applications, e.g. to secure £35k by the end of Q3 by increasing the number of applications completed by 15%.

If objectives describe the output achieved by an employee – the ‘ends’, behaviours describe the qualities an employee needs to reach these ends – the ‘means or how’ of working. Examples of behaviours include:

- Communication skills, e.g. To improve my ability to present clearly at school events by completing a public speaking course before the start of the academic year.
- IT skills, e.g. To improve my confidence with spreadsheets by completing an online Excel course by the end of this Quarter.

4. Reviewing this policy

This policy will be reviewed annually.