



# **‘Our People’: A Performance Development Framework**

**at**

**Reach South Academy Trust**  
*‘Aspiration beyond expectation’*

**September 2023**

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## 1. Introduction

**Dave Bookbinder** — 'People are an organization's most valuable asset and the key to its success'

This well-known quote is often mentioned and despite it becoming a cliché and the criticism regarding the term “asset” being de-humanising, it is clear our people are the foundation of which Reach South Academy Trust is built upon. It is recognised through our values, ethos and guiding principles that having the best people, with integrity, the commitment to make a difference, and the skills and experience we can have a positive impact on our children and the wider community.

The Trust's People Strategy (2021-2026) developed in line with this principle, is built upon the underlying assumption that our people are the driving force behind our success, and when our people perform at their best, we deliver the highest quality education and pupil experience.

The development and implementation of a Performance Development Framework across the Trust will provide the foundation to support some of the key deliverables of the People Strategy such as professional development, organisation performance, improve staff retention, engagement, and wellbeing.

## 2. Background

The term 'Performance Management' is the paradigm covering the overall performance of the workforce and organisation. It is a holistic model aimed at ensuring the performance of all employees are aligned with the direction of the organisation. It aims to maintain and improve employees' performance in line with an organisation's objectives and strategic direction. It's a not a single activity, but rather a group of practices that should be approached holistically.

The Education (School Teacher's Appraisal) Regulations 2012 for all maintained schools, which is not a legal requirement for academies but advisory, sets out the process of appraisal in relation to general performance as part of performance related pay and the Teacher Standards'.

Appraisal forms part of the annual cyclic nature of Performance Management and has expanded over recent years to incorporate much more than just performance objectives.

The world we operate in now is very different and for organisations to be successful (even in the public sector), they need to be agile and adaptable to change. Therefore, the once-a-year objective setting and the annual cycle of performance is no longer working. There is a momentum to move away from the annual appraisal meeting to a more rounded approach of continuous feedback.

The wording in the DfE's model appraisal policy advises that teachers should receive constructive feedback on their performance throughout the year and this is mirrored in good practice of people management. Academic research *recommends that organisations must not see employee performance appraisal as just an annual activity but recognise it as a continuous activity and an important resource that can provide enormous benefits to enhance the success of the organisation (Brefo-Manuh et al. 2016)*

### 3. What we want to achieve

Our vision for the Performance Development Framework, that, it is unique, organic and holistic in its approach to underpin the overall performance and culture of the Trust to ensure we have the best people that collectively **Raise the Educational Achievement** of our **CHildren** and prepare tomorrow's adults.

This vision will be achieved, through the movement away from the traditional once-per-year appraisal and embracing a continuous approach to performance review and development.

### 4. Benefits for Continuous Feedback (CF)

There are a wide range of benefits for adopting a continuous feedback approach as part of the new Performance Development Framework.

- **It improves staff engagement** – Based on decades of employee engagement research, engaged employees produce better business outcomes than other employees - across industry, company size, and nationality, and in good economic times and bad. The use of CF has been shown to increase staff engagement as staff feel valued as they receive constructive feedback in a timely manner, have better relationships with their managers, have clarity on what is expected of them and feel included in the direction of the organisation.
- **It can improve staff wellbeing and reduce work pressures** - staff are able to seek and receive advice from managers on how to effectively overcome the pressure from the tasks at hand or even day to day activities.
- **It drives employee growth** - regular conversations and feedback around staff's performance, growth and development with staff taking an active role in setting and discussing goals with managers will drive employee growth. This has a positive impact on the overall performance of the organisation.
- **Improves organisational alignment and agility** – regular conversation enables managers to address rapid changed where needed or challenges that need to be addressed quickly.
- **Improves trust, facilitates stronger relationships and empowers staff in their role** – leading to greater staff engagement, and reduction in sickness absences and poor performance.
- **Improves communication** as conversations are taking place regularly.
- **Bespoke to staff and the organisation needs** – process is driven at a personal level to address the needs of the organisation.

### 5. Introducing the framework

The Performance Development Framework will have several guiding principles to support the development, implementation and longevity of this new approach in the Trust.

#### The Guiding Principles of the Trust's Performance Development Framework:

- Will not link to performance related pay [with exception for those on Upper Pay Range and Leadership range].
- Will be an ongoing and transparent process to evaluate performance.
- Will align with the school improvement plans and wider strategic direction for the Trust.
- Will celebrate the successes and achievements of our people.

- Will focus on the personal development of our people to support succession planning and talent management.
- The focus will be on the content of the conversation to add value to the process, and not the process itself.
- Will be simple and effective to avoid duplication and the administrative burden.
- Will support the building of relationships to improve motivation, morale and overall staff engagement that will positively impact on the education of children in our Trust.
- Finally, will align with our culture, values and behaviours.

## 6. Structure of the Framework

Whilst the formative approach to annual appraisals is considered one of the main reasons the process is ineffective, there, is still a requirement for some form of structure to be in place to support and encourage a “continuous feedback” approach.

The cyclic element is still required; however, the timing of the “cycle” may be more fluid to align with the operational needs of the school or department to enable an agile and flexible process.

### The Core Structure

- Continuous feedback meetings will take place throughout the year, with the start of the process taking place at the start of the academic year for existing employees. Where a person joins at a different point in the year or return from an extended period of absence such as maternity or sick leave, they will start the process when they commence work.
- These meetings will be referred to as part of the “continuous feedback”.
- These conversations should be carried out by the employee’s immediate manager on a one-to-one basis. Training will be provided to all staff to support the framework.
- The conversations can follow one or more of the set “themes”
- Employees will be able to access blank Performance Development Review forms prior to the first meeting with their manager. Part 1 of the form will be required to be completed by the employee prior to the first meeting with their manager.

### Preparation for meeting and looking forward (Part 1 of Continuous Feedback Form)

In the completion of Part 1, the employee will undertake a self-reflection of their performance in their role and prepare for the meeting with their manager, considering the themes they wish to cover in relation to their performance, development, and wellbeing.

Employees are encouraged to be honest and should reflect on the challenges they have faced over the last 12 months and are encouraged to celebrate their successes in their performance and where they have exceeded expectations.

The form will provide employees with the scaffolding to both reflect and look forward in considering the priorities for the forthcoming review period.

### First Conversation (Part 2 of Continuous Feedback Form)

To start the continuous feedback process, an initial meeting will take place. Using the preparation form as a guide, this meeting is for the employee and manager to discuss the contents of part 1 and agree on the set objectives for the next review period and discuss any personal development plans. In some cases, the manager may decide to set different objectives as suggested by the employee in part 1.

The Continuous Feedback Form will be completed and signed by both parties, and is kept as a working document, where key points of the subsequent continuous feedback meetings will be captured.

### **How often would meetings take place?**

This would vary from person to person and would be agreed between the employee and the line manager. Ideally, the minimum would be for conversations to take place at least twice during the year. The recommendation would be that these take place termly, as a minimum, and link in with normal management catch up meetings with employees. However, it could be more frequent if required.

The Performance Development Framework is intended to work alongside normal management practices, and not be a standalone process. Therefore, these meetings are designed to be short, around 15 mins and are an opportunity to review progress and discuss action points for the next review period. In some cases, it may be decided that an objective is no longer required or has changed, and therefore, a note of this will need to be made on the form.

### **What are the themes for the continuous feedback conversation?**

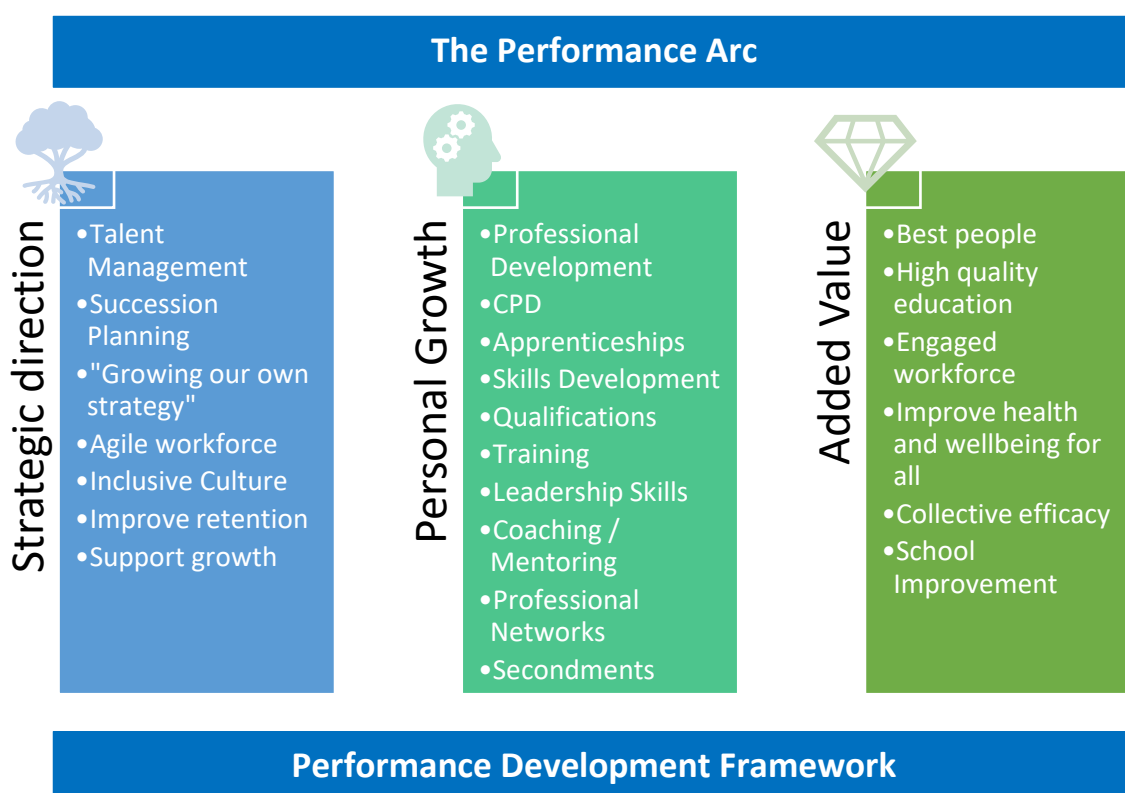
There are five conversation themes that employees and their line manager can choose to use. It is flexible what themes are used and may change throughout the year. However, performance will always sit at the heart of the continuous feedback.



- **Performance** – setting and monitoring of performance objectives, providing constructive feedback on performance in role, and provide an opportunity to address any concerns in performance at an early stage.
- **Successes and Achievements** – celebrating successes is an important part of continuous feedback, as it ensures staff feel valued and improves morale.
- **Professional Development** – Staff will be encouraged to discuss personal development plans or goals, and this will be reviewed as part of the conversation meeting. Staff's own development needs to be self-driven, and continuous throughout the year. Any learning opportunities highlighted can be actioned quickly through these meetings.
- **Aspirations (Career)** – discussing staff's aspirations or areas of their career they wished to progress. Aspiration is not always linear or hierarchical. Staff may wish to specialise or even maintain the status-quo.
- **Wellbeing and Engagement** – allowing a time and space for staff to discuss any wellbeing and engagement concerns they may have is important for the success of this process. It will build relations, address any concerns early such as potential work-related stress and be able to address any work pressures quickly.

## 7. The Performance Arc

The Performance Development Framework provides the foundation and scaffolding that will underpin the performance of the Trust. It will link with other key areas and provide a range of benefits to form a Performance Arc across the Trust



## 8. How will we measure our success?

The Performance Arc outlines several areas where the Performance Development Framework will have an impact, therefore, a range of both quantitative and qualitative measures will be used to determine the overall effectiveness.

These will include:

- Trust wide Staff engagement survey information.
- Focus feedback sought from pulse surveys and focus groups.
- Retention and staff turnover figures, including analysis of Leaver Surveys and any other associated KPIs.
- Employee relation statistics with a focus on sickness absence and improving performance data.
- Internal recruitment analytics with regards to talent management and promotional opportunities.
- Professional Development and training statistics, including review of apprenticeships paths ways and analysis of the training budgets and Apprenticeship Levy usage.
- Skills analysis and training needs analysis to assess improvements in our gaps.
- Overall Trust performance analytics and School Improvement progress review.
- Case studies.

## References and Resources:

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