

Lakeside School; annual audit of performance management: 2019-2020

Staff member	Are/Were targets consistent with the level of role?	Are/Were targets SMART?	Is there a link between targets and the school improvement plan?	Is a range of evidence to be considered in making the judgement?	Are Teachers' Standards being used?	If reviewing after interim/ end of year review, is there evidence of clear and two way dialogue regarding performance?	Are/Were training needs documented and met (if applicable)?	Comments:
A – Admin Grade C	Yes	Yes	Link not specified but it's clear that targets are supportive of the SIP through efficient management of pupil records and finance.	Working practice recorded.	N/A	Manager's comments but no employee comments	Met or on-going but no evidence supplied.	Only the completed form available; no evidence folder.
B – Admin Grade F	Yes	Yes	Link not specified but it's clear that targets are supportive of the SIP through efficient management of pupil records and finance.	Working practice recorded.	N/A	No interim or end of review comments from manager or employee	Completed but no evidence supplied.	Only the completed form available; no evidence folder. Exceptional activities are detailed on the form.
C – LSA 111	Yes	Yes	Yes	Yes	N/A	No employee comments	Yes. Evidence supplied	
D – LSA 111	Yes	Yes	Yes	Yes	N/A	Both manager and employee comments included	Yes. Evidence supplied	
E – LSA11	Yes	Yes	Yes	Yes	N/A	Both manager and employee comments included	Yes. Evidence supplied	
F –SSW	Yes	Yes	Yes	Yes	N/A	No manager comments	Yes. Evidence supplied	Folder organisation, including a helpful contents page, was exemplary. Manager had not

								completed assessment column for Job accountabilities or targets.
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Comments on the overall process of PM at Lakeside

The audit showed that the PM process at Lakeside continues to be taken seriously by all concerned. The HCC model form was used in all cases and we had no doubts about the validity of the pay decisions made. Last year we said *“We found it particularly useful when the targets were not only clearly relevant to the SIP but were also cross-referenced to the specific numbered section. We would encourage all staff to do this where possible.”* We accept that reference to numbered SIP items is less appropriate for administrative staff, but were pleased to see that all the support staff forms sampled this year had such references. Last year’s audit also suggested *“that where an individual is judged to be exceeding the requirements of the role, managers are specific about what they have done which goes above and beyond the norm.”* For those exceeding requirements in this sample, the exceptional tasks undertaken were explained on the form by the employee or evidenced through additional documents in the folder. Although we believe the process to be robust, staff dialogue to be effective and decisions to be based on proper assessment, there are still some omissions in the completion of the forms. For instance, in various forms manager or employee comments were missing, there was no assessment rating entered against job accountabilities or targets and the overall performance rating box had not been ticked. It would be good to remind reviewers to check these things before interim reviews take place. We would also suggest that the member of staff whose evidence folder was exemplary should be encouraged to share their practice with others in some way to further develop reviewees’ skills in this area.

Date audit completed: 10/3/2020

Name of governors: Hazel Round and Di Chamberlain

Signed:.....