



PERFORMANCE DEVELOPMENT SYSTEM

For

ANCILLARY STAFF

in SCHOOLS

This booklet contains two parts:

Part A: Personal Plan and Development; *and*
Part B: Personal Report

NAME:

SCHOOL:

YEAR:

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PART A: PERSONAL PLAN AND DEVELOPMENT

1 INTRODUCTION

- The purpose of your personal plan is to record the key tasks for the coming year that you want to focus on as well as the areas where you would like to further develop your skills.
- Your personal plan must be completed and signed off by both your appraiser and your school Principal no later than 28 February each year.
- This booklet provides space for you and your appraiser to record details throughout the year of your progress towards meeting the key tasks and gaining the skills you have identified in this Personal Plan. *This should be done mid-year and then again at the end of the year.*
- Your final assessment is to be forwarded to your Principal no later than 30 November.
- All the information you will need to complete this Personal Plan is included in this booklet.
- Your principal will have another booklet called “*Principals’ Guidelines for PDS*”. This booklet will contain information about how you can appeal any performance reviews that you don’t agree with. You do this in the same way as teachers.
- A copy of this Personal Plan booklet can also be downloaded from the Ministry of Education web site if you wish to complete it electronically.
- This booklet must be kept by you throughout the year so that by the end of the year, it will contain all the information you need to hand in for your final assessment.
- Once you have filled in your key tasks and identified your skill development areas, photocopy this booklet and give a copy to your appraiser.

Completion of your Personal Plan requires that you reflect on your level of work in your position openly and honestly. It is important that you take time to think carefully about how you can improve your skills and performance.

2 PERSONAL DETAILS: *(Complete all sections)*

Name:	
<i>Christian Name(s)</i>	<i>Surname</i>
Name of Your School:	Name of Your Principal:
Name of Your Appraiser:	
Your Position in the School:	

3 GETTING STARTED

You will need the following documents to help you complete this personal plan:

- (i) A copy of your current position (job) description – your principal will give you this.
- (ii) A copy of the Competencies and Key Performance Indicators (KPIs) for ancillary staff which are included in Appendix 1 on Pages 17-18 of this booklet.
- (iii) A copy of the Performance Ratings for Ancillary Staff which is included in Appendix 2 on Page 19 of this booklet.
- (iv) A copy of this booklet in which you will enter your personal plan for the year.
- (v) Your personal plan and final appraisal report from last year (if this is your first year in the job you will not have this document).

4 KEY TASKS AND EXPECTED OUTCOMES

- (i) Select the three key tasks from your position description that you want to focus on this year and enter them in Table One below in the first column. Your appraiser will need to approve your selection of key tasks at your first interview.
- (ii) Now fill in what your expected outcomes will be and enter these in the second column. This is what you expect to achieve by focusing on each chosen key task. Two examples are provided below in Table One:

Examples:

Table One:

Key Task <i>(Taken from Position Description)</i>	Expected Outcome <i>(What you Expect to Achieve)</i>
To cut the grass around all buildings	The grass has been cut at least once per fortnight in the rainy season and once every three weeks in the cooler months so as to ensure that the school has a neat and tidy appearance and that there are no mosquito breeding sites.
To provide receptionist services	The phone is always answered promptly and politely. Visitors are welcomed and feel valued. Messages are taken and passed on as soon as possible. The first point of contact with the school shows a positive image.

**Now fill in the Key Tasks and Expected Outcomes
In Table Two on the Next Page:**

Table Two:



Key Task One <i>(Taken from Position Description)</i>	Expected Outcome <i>(What you Expect to Achieve)</i>
Key Task One:	What I Expect to Achieve
Appraiser Comments <i>(Your appraiser will complete this when he/she meets with you mid-year)</i>	
Appraiser Comments <i>(Your appraiser will complete this when he/she meets with you at the end of the year)</i>	
Key Task Two <i>(Taken from Position Description)</i>	Expected Outcome <i>(What you Expect to Achieve)</i>
Key Task Two:	What I Expect to Achieve
Appraiser Comments <i>(Your appraiser will complete this when he/she meets with you mid-year)</i>	
Appraiser Comments <i>(Your appraiser will complete this when he/she meets with you at the end of the year)</i>	
Key Task Three <i>(Taken from Position Description)</i>	Expected Outcome <i>(What you Expect to Achieve)</i>
Key Task Three:	What I Expect to Achieve
Appraiser Comments <i>(Your appraiser will complete this when he/she meets with you mid-year)</i>	
Appraiser Comments <i>(Your appraiser will complete this when he/she meets with you at the end of the year)</i>	



5 DEVELOPMENT PLAN

In this section, you identify one area that you want to focus on developing this year to improve your skills, knowledge or experience. An example is provided for you below:

Example:

Area for Development: Maintaining school machinery and carrying out minor repairs	
Skills, Knowledge, Experience I want to Develop: To know how to do basic servicing of school machinery and carry out basic maintenance and repairs.	
What Will I Do? <ol style="list-style-type: none">1 Study relevant manuals for machinery currently owned by school2 Investigate the possibility of attending a machinery maintenance course3 Prepare a regular maintenance schedule for all machinery	

Now Fill in Your Development Plan (Table Three) Below

Table Three:

Area for Development:
Skills, Knowledge, Experience I want to Develop:
What Will I Do?
Self Reflection on What You Achieved <i>(Complete this section at the end of the year to note how successful you were in developing your skills, knowledge and experience in the area of development chosen)</i>

6 Providing Copies of Your Personal Plan to Your Principal

- Once you and your appraiser have agreed on your Personal Plan, provide a copy of it to your appraiser. If your appraiser is not your principal, you will need to provide your principal with a copy of your personal plan also.
- Keep the original copy yourself and place it in your Personal Folder.
- It is recommended that you use a Clear-file for your Personal Folder. You should retain copies of the following documents in your folder:
 - This Personal Plan and Performance Booklet.
 - Copies of your previous annual performance appraisal reports.
 - Your current position description.
 - Documents relating to any development/courses you have attended during previous years.
 - Details of any qualifications you are undertaking e.g. results from USP or other courses.
 - Any other relevant documents.
- Your Personal Folder will provide evidence that you have and are continuing to develop your skills and knowledge.

7 Receiving Feedback and Reviewing your Progress

Reviewing Your Progress –Mid Year and End of Year Reviews

- Your progress against your Personal Plan will be monitored formally through the mid-year and end-of-year (final) appraisal process. Before each of these interviews:
 - Spend some time preparing yourself by reflecting on how well you are doing completing each of your key tasks.
 - Gather any supporting evidence to support your achievements.
- These two reviews meet the formal requirements of the Performance Development System, however, there should be ongoing opportunities for discussion, observation and feedback between you and your appraiser during the regular activities of the school year.
- Your Appraiser will write his/her comments in the relevant boxes on Table Four on the next page.
- At the end of year interview, your Appraiser will review the competencies for Ancillary Staff. Additional information about this is provided later in this booklet.

MID-YEAR PERFORMANCE SUMMARY

Prior to meeting with your appraiser mid-year – complete your own self-review of your progress towards meeting your three key tasks below. Your appraiser adds her/his comments following your meeting.

Table Four:

Key Tasks	Your Self Review <i>(What has gone well – what is not going so well, what might you need to do now?)</i>	Your Appraiser's Comments <i>(Appraiser comments on your progress and offers helpful suggestions)</i>
One		
Two		
Three		Appraisers initials:.....

END OF YEAR PERFORMANCE SUMMARY

At the **end of the year**, you are required to complete your self-review in Table Three on Page 6 of this booklet. Your appraiser must then complete the following documents:

- (i) The End of Year Performance Summary below (*Table Five*). S/he will comment on how well you have achieved the three key tasks that you identified as focus areas this year. You must also provide evidence of your achievements which will be noted in this summary by your appraiser. This may include observation, feedback, oral examples etc.

Table Five:

Appraiser's Comments on Your Achievement of Key Tasks	Evidence of Achievement
Key Task One:	
Key Task Two:	
Key Task Three:	

Your appraiser must now comment on how well you have achieved the skills, knowledge and experience you wanted to gain as part of your development (*Table Six*). Examples of changes your appraiser has observed you make in the way you do your job should be included. Your appraiser should also include suggestions of areas that you can develop further next year.

Table Six:

Skills, Knowledge, Experience Developed This Year (<i>Appraiser to complete outlining your development success and how you applied the new skills etc that you learned</i>)
Suggestions for Development Next Year (<i>Appraiser makes suggestions on what areas you should look to focus on developing next year</i>)

- (ii) Your appraiser now signs off the confirmation below (*Table Seven*):

Table Seven:

APPRAISER CONFIRMATION AND SIGN OFF
<p>I (<i>Appraiser's Name</i>) confirm that I have observed (<i>Staff Member's Name</i>) over the past year. I have provided feedback on a regular basis and consider this report to be an accurate reflection of their performance.</p> <p>Appraiser's Signature:</p> <p>Date:</p>

PART B: PERSONAL REPORT

1 Instructions and Guidelines

- The purpose of Part B of this booklet is to provide an overall report on the performance of Ancillary Staff.
- Your Principal has a copy of the guidelines if you want clarification on any aspects of this process.
- All Ancillary Staff have the right to appeal decisions made about their performance. The Principal has a copy of the guidelines should you not agree with the performance rating given to you. These guidelines are also available on the Ministry of Education website.
- The same guidelines apply to both teaching and non-teaching staff and set out the eligibility requirements for salary reviews.
- This report will be forwarded to the Ministry of Education at the end of the year for the purpose of verification.
- **Completion of this report is the responsibility of the Principal.**

2 Key Tasks

- (i) The three key tasks identified as being areas of focus for this year were completed at a level considered to be satisfactory or better.

YES ☐ **NO** ☐ (Tick the appropriate answer)

- (ii) If the answer to (i) above is no, please explain:

- (iii) All other key tasks identified in the position description were completed to a satisfactory level

YES ☐ **NO** ☐ (Tick the appropriate answer)

- (iv) If the answer to (iii) above is no, please explain:

- (v) Some tasks remained incomplete but I am satisfied that there were good reasons for this, ie events beyond the control of this staff member meant a specific key task(s) could not be completed.

YES ☐ NO ☐ NA ☐ (Tick the appropriate answer)

- (vi) If the answer to (v) above is no, please explain:

3 Competencies and Indicators

Place a tick in the relevant box below to indicate your overall assessment. Your assessment should be based upon observation and evidence provided by the staff member. Please note that the Ministry of Education may seek to verify the information you provide in this section. It is important therefore that you provide a fair and accurate assessment.

Competency and Indicators	Consistently Demonstrates	Demonstrated But Not On a Consistent Basis	Not Demonstrated
Team Work - Is the ability to work co-operatively with colleagues to achieve team and whole of school goals. It includes having respect and understanding for the different perspectives held within other parts of the school and a willingness to focus on common goals. For senior roles it includes the ability to build teams.			
1.1 Participates willingly			
1.2 Keeps other team members informed			
1.3 Shares ideas and relevant information			
1.4 Builds on others' ideas			
1.5 Respects the needs and contributions of others			
1.6 Understands and respects the feelings of others			
1.7 Supports team decisions			
1.8 Delivers on commitments			

Competency and Indicators	Consistently Demonstrates	Demonstrated But Not On a Consistent Basis	Not Demonstrated
<u>Communication</u> - <i>Is the ability to hear what others are saying; understanding the thoughts, feelings and concerns of others; clearly passing on information and ideas to individuals or groups in a way that helps them understand and retain the message.</i>			
2.1 Speaks clearly and concisely in either or both Cook Islands Maori and English			
2.2 Uses appropriate style to suit the audience			
2.3 Asks for clarification when unsure			
2.4 Allows the other person to speak, encourages feedback			
2.5 Responds to others by altering own behaviours and communication style			
2.6 Demonstrates sensitivity and acts to help individuals resolve issues			
<u>Stakeholder Focus</u> - <i>Is the ability to understand the explicit and underlying needs of teachers, children, students, parents/caregivers etc. and to use this information to provide a high level of support.</i>			
3.1 Makes an effort to understand the needs of the school; works with others to provide the best service possible			
3.2 Shows understanding			
3.3 Meets or exceeds the expectations of stakeholders if possible			
3.4 Is proactive and anticipates needs			
3.5 Takes responsibility/action			
3.6 Is courteous, patient, pleasant and helpful			
3.7 Corrects problems promptly and without being defensive or blaming others			
<u>Being Accountable</u> - <i>Is about demonstrating a drive to do the job well, doing things better and more effectively, persevering until it is delivered/completed, setting and achieving challenging goals for self or team.</i>			
4.1 Wants to do the job well, on time and to required standards			
4.2 Sets and meets personal goals that are in line with work expectations and standards			
4.3 Makes changes in work to improve performance			
4.4 Encourages others to improve their performance, shares ideas			
4.5 Perseveres even when difficulties arise			

Competency and Indicators	Consistently Demonstrates	Demonstrated But Not On a Consistent Basis	Not Demonstrated
Planning and Organising - Is about establishing courses of action for self (and others) to ensure that work is completed efficiently and effectively; using problem solving and planning skills to make judgments and take appropriate actions; and anticipating future opportunities, problems and potential obstacles.			
5.1 Gathers information			
5.2 Identifies underlying issues or problems			
5.3 Establishes and reviews priorities			
5.4 Determines the available resources within which work must be completed			
5.5 Sets and meets deadlines			
5.6 Informs/involves others where necessary			
5.7 Uses a calendar, to-do list or other systematic process to schedule tasks			
Developing Self – is about taking the time to plan and work on the development of one's own skills and abilities in order to fulfill current or future job responsibilities more effectively.			
6.1 Takes the initiative to determine own development needs			
6.2 Commits time and energy to self-development			
6.3 Attends formal training courses and participates fully			
6.4 Shows interest in learning new ways of doing things, tools and technologies in the workplace			
6.5 Clarifies expected behaviours, knowledge and level of proficiency			
6.6 Actively participates in learning activities to make the most of the learning experience			
Valuing Others – Is the ability to understand, appreciate, respect and get the best from all people.			
7.1 Recognises differences between genders, different groups of people and cultures			
7.2 Acts to fit in with the situation or the person			
7.3 Encourages others to be open minded and to appreciate alternative cultural perspectives			
7.4 Is responsive to all people			
7.5 Acts to fit in with the situation or the person			

4 Assessment

My assessment is that sufficient evidence has been gathered or observed to confirm that:
 (Enter staff member's name) has
consistently demonstrated each of the competencies for Ancillary Staff.

Signed: (Principal)
 Date:

OR

..... (Enter staff member's name)
 has **not consistently** demonstrated the following competency(ies) (circle those that apply):

1 Teamwork 2 Communication 3 Stakeholder Focus 4 Being Accountable	5 Planning and Organising 6 Developing Self 7 Valuing Others
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Signed: (Principal)
 Date:

Staff Member's Statement: Please tick appropriate box

This report provides an accurate record of my performance and development	<input type="checkbox"/>	I do not agree with this report and I have completed a written rebuttal that is attached to this form	<input type="checkbox"/>
Staff Member's Signature: (Signature certifies that I have read the report)			

Recommendation: Refer to Appendix 2 on Page 19 for criteria for awarding performance ratings.

My recommendation is that this staff member's overall performance for the year be rated (*circle one*):

Excellent

Competent

Unsatisfactory

Note if your recommended rating is "Excellent" you must provide comments in the table below as to the recognised contribution this staff member has made to the culture and/or environment of the school:

Principal's Comments:

Signed: (*Principal*)

Date:

Evidence for Excellent Endorsement

To gain excellence, a staff member must show that they have consistently achieved beyond the requirements of their job description and/or the criteria of the relevant competencies and indicators

This table should be submitted with the PDS booklet and teacher attestation.

KEY TASKS

Key Task	Expected KPI	How this has been consistently exceeded

For Office Use Only: Report received from school:.....(Date)

Report Verified By: (Name of review officer)

Has this staff member been reviewed by PD this year? (Circle as appropriate) **YES** **NO**

Comments:

Overall Performance is (*circle one*): **Competent** **Excellent** **Unsatisfactory**

Signed: (Director of PD)

Date:

Report Received by Director HRM: (Date)

Action Taken: (*Circle as appropriate*)

1	Recommendation to Secretary for Performance Increment/Bonus	YES	NO	NA
2	Initiation of PIP	YES	NO	NA
3	Future Professional Development needs noted for facilitation	YES	NO	NA

Signed: (HRM Advisor)

Date:

Appendix I: Competencies for Ancillary Staff

Competencies apply to all Ancillary Staff. They underpin our Performance Development System by describing the important behaviours, skills and attitudes that our Ancillary Staff are expected to demonstrate in carrying out their role.

Competency	Descriptor	Key Performance Indicators
1. Team Work	Is the ability to work co-operatively with colleagues to achieve team and whole of school goals. It includes having respect and understanding for the different perspectives held within other parts of the school and a willingness to focus on common goals. For senior roles it includes the ability to build teams.	1.1 Participates willingly
		1.2 Keeps other team members informed
		1.3 Shares ideas and relevant information
		1.4 Builds on others' ideas
		1.5 Respects the needs and contributions of others
		1.6 Understands and respects the feelings of others
		1.7 Supports team decisions
		1.8 Delivers on commitments
2. Communication	Is the ability to hear what others are saying; understanding the thoughts, feelings and concerns of others; clearly passing on information and ideas to individuals or groups in a way that helps them understand and retain the message.	2.1 Speaks clearly and concisely in either or both Cook Islands Maori and English
		2.2 Uses appropriate style to suit the audience
		2.3 Asks for clarification when unsure
		2.4 Allows the other person to speak, encourages feedback
		2.5 Responds to others by altering own behaviours and communication style
		2.6 Demonstrates sensitivity and acts to help individuals resolve issues
3. Stakeholder Focus	Is the ability to understand the explicit and underlying needs of teachers, children, students, parents/caregivers and to use this information to provide a high level of support.	3.1 Makes an effort to understand the needs of the school and works with others to provide the best service possible
		3.2 Shows understanding
		3.3 Meets or exceeds the expectations of stakeholders if possible
		3.4 Is proactive and anticipates needs
		3.5 Takes responsibility/action
		3.6 Is courteous, patient, pleasant and helpful
		3.7 Corrects problems promptly and without being defensive or blaming others

Competency	Descriptor	Key Performance Indicators
4. Being Accountable	Is about demonstrating a drive to do the job well, doing things better and more effectively, persevering until it is delivered/completed, setting and achieving challenging goals for self or team.	4.1 Wants to do the job well, on time and to required standards
		4.2 Sets and meets personal goals that are in line with work expectations and standards
		4.3 Makes changes in work to improve performance
		4.4 Encourages others to improve their performance, shares ideas
		4.5 Perseveres even when difficulties arise
5. Planning and Organising	Is about establishing courses of action for self (and others) to ensure that work is completed efficiently and effectively; using problem solving and planning skills to make judgments and take appropriate actions; and anticipating future opportunities, problems and potential obstacles.	5.1 Gathers information
		5.2 Identifies underlying issues or problems
		5.3 Establishes and reviews priorities
		5.4 Determines the available resources within which work must be completed
		5.5 Sets and meets deadlines
		5.6 Informs/involves others where necessary
		5.7 Uses a calendar, to-do list or other systematic process to schedule tasks
6. Developing Self	Is about taking the time to plan and work on the development of one's own skills and abilities in order to fulfill current or future job responsibilities more effectively.	6.1 Takes the initiative to determine own development needs
		6.2 Commits time and energy to self-development
		6.3 Attends formal training courses and participates fully
		6.4 Shows interest in learning new ways of doing things, tools and technologies in the workplace
		6.5 Clarifies expected behaviours, knowledge and level of proficiency
		6.6 Actively participates in learning activities to make the most of the learning experience
7. Valuing Others	Is the ability to understand, appreciate, respect and get the best from all people.	7.1 Recognises differences between genders, different groups of people and cultures
		7.2 Acts to fit in with the situation or the person
		7.3 Encourages others to be open minded and to appreciate alternative cultural perspectives
		7.4 Is responsive to all people
		7.5 Acts to fit in with the situation or the person

Appendix 2: Performance Ratings for Ancillary Staff

At the completion of the appraisal process, the School Principal is required to make a recommendation as to your overall performance. These recommendations are forwarded to the Ministry of Education for their verification.

The following table sets out the three levels of performance and the requirements ***that must be met*** for a recommendation of each to be made.

	Ancillary Staff
Unsatisfactory Performance	<ul style="list-style-type: none">• One or more of the key tasks were not completed to a satisfactory level and there were no reasons outside of the staff member's control that prevented this; OR• The staff member either does not demonstrate, or fails to consistently demonstrate three or more of the competencies for Ancillary staff.
Competent Performance	<ul style="list-style-type: none">• Completes all key tasks to a satisfactory level; and• Consistently demonstrates all aspects of at least five of the competencies for Ancillary Staff. <p>NOTE: If some key tasks have not been completed and the Principal is satisfied that there were reasons outside of the staff member's control, then a rating of competent may be given if all other criteria were met.</p>
Excellent Performance	<ul style="list-style-type: none">• Completes all key tasks to a satisfactory level; and• Consistently demonstrates all aspects of all seven competencies for Ancillary staff; and• Is recognised by others as having made a significant contribution to the culture and/or environment of the school. <p>NOTE: If some key tasks have not been completed and the Principal is satisfied that there were reasons outside of the staff member's control, then a rating of excellent may be given if all other criteria were met.</p>