



inspired

GUIDE TO HIGH PERFORMANCE FOR LINE MANAGERS

“Driving A Culture of Excellence”



OVERVIEW

The Inspired **Global Performance Management Process** applies to all Inspired staff. It provides a framework for everyone who is employed by Inspired Education to be clear on what is expected from them; to be clear what they need to be able to grow and develop and allows clear goals/objectives to be agreed upon and measured, ultimately delivering great outcomes for students and Inspired.

This Guide is created to help Heads/line managers to be clear on how to effectively create a climate of high performance and achieve the (business) Group's/ School's goals and should help to align all Inspired staff on best practice performance management processes.

It does this by describing all the key stages of a progressive performance management process and the supporting toolkits which can be implemented locally.

IMPLEMENTATION

One of Inspired's strengths is in our uniqueness as well as the quality of what we offer to students and staff. For this reason, the Performance Management Process and requirements vary within countries/schools/offices, with differences in the approach to quality assurance, performance criteria and documentation utilised and available.

Therefore, this guide is intended to promote best practice in Performance Management in each and every school and office environment to embed a high performance culture and seek excellence in education. Where great performance management practices exist it is only essential that the key steps of this guide are included; great performance management processes and documents that already exist do not have to be replaced. The essential four steps that should exist for every line manager and their employees should be:

1. Effective planning and establishing objectives
2. Continuously reviewing performance and providing constructive feedback
3. Creating the conditions to deliver high performance
4. The opportunity for self-reflection and a formal measurement of performance at the end of a defined period (e.g. School Year or Financial Year)

! Every Line Manager should ensure these practices are in place for each one of their team

If you're a new Head / manager or leader to Inspired or any of the Schools in Inspired please speak to your local HR team or Line Manager who will be able to provide you with the correct training material for (in) your School or Department.

There are a number of supporting documents to help individuals and management teams embed this guide in full:

- Inspired Leadership Standards
- Inspired Teacher Standards
- SuccessFactors User Guide



WHY THIS IS IMPORTANT

Our aim is to be the very best premium independent school brand in the world consistently striving to deliver excellence.

We will achieve this by putting our teams and colleagues at the heart of what we do, performing to the very best of their abilities day in, day out.

Inspired's performance process ("PRP") is designed to help everyone consistently deliver great outputs through creating a culture of high performance and a team who knows how their actions add value to our students, stakeholders and (business) group of schools.

Our SuccessFactors technology provides the technology functionality needed to complete all core elements of the Inspired Performance Review Process and should be utilised when available. The processes included on SuccessFactors include:

1. Agreeing and setting objectives with Heads/ line managers
2. Self-appraisal of performance
3. Formal recording of performance measures

For more information on SuccessFactors please speak to your local HR team as the business is undertaking a phased roll-out of SuccessFactors in 2021-2022

Benefits to Inspired of a strong and consistent performance framework

- ✓ A culture of continuous improvement of (to) individual performance
- ✓ The identification of future career opportunities and career routes in the organisation
- ✓ The retention and progression of Inspired Staff
- ✓ Improved attractiveness to external candidates seeking a progressive organisation
- ✓ Engagement and motivation of staff through clear objectives; feedback and clarity
- ✓ The highest possible performance from all employees, teaching and non-teaching

Benefits to colleagues/staff

- ✓ Clarity on what's expected in their role
- ✓ Feedback to help growth and self-development
- ✓ Opportunity to build stronger relationships with Heads/ line managers
- ✓ Identifies future career development opportunities and support required
- ✓ Awareness of how personal objectives link to the School's/Group's (Business) objectives
- ✓ Opportunity to ensure all objectives are SMART

Benefits to Line Managers/Quality Assessors

- ✓ Confident that teams have the direction they require to be at their best
- ✓ A structured opportunity to give feedback to improve performance
- ✓ Supports the engagement and motivation levels of colleagues
- ✓ Embedding teaching and leadership standards
- ✓ Opportunity to review and adjust objectives and address underperformance frequently

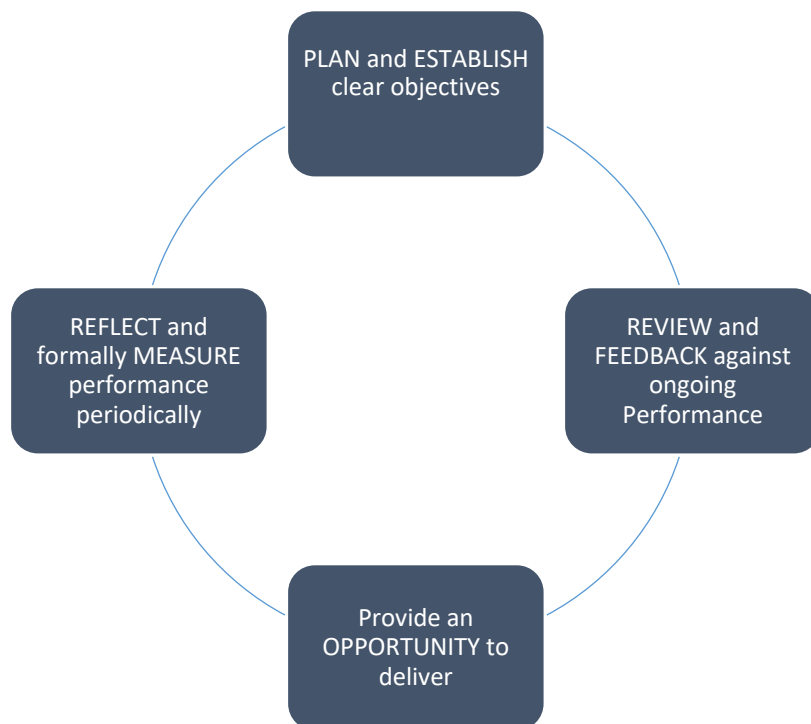


THE INSPIRED 'PERFORM' PROCESS

We actively encourage differences in Performance Management Processes because we believe acknowledging local requirements and standards is important and is the best way to utilise the strengths of our unique network.

But whilst differences may exist in the specific processes; documentation; measurement and others, it is essential that the 4 PERFORM process steps are implemented in every school in every country by leaders and managers.

Inspired PERFORM Steps



IMPLEMENTING THE PROCESS

STEP ONE: PLAN AND ESTABLISH CLEAR OBJECTIVES

Establishing meaningful objectives with a head/ line manager is a critical activity at the start of a school term or financial year or if someone is new to their role (within 3 months of joining).

Objectives should be aligned to the strategy and priorities/plan of the school (business), and for School-based roles be aligned to key areas of the Inspired academic standards for Teachers and Leaders which may need improvement.



Where do objectives come from?

Inspired Global Goals



Broken down into

School/ Department Objectives



Broken down into

Positive enrolment/academic/financial outcomes



Supported by

Inspired's Standards



My Objectives

This is the part YOU play in helping Inspired to achieve its goals

Personal objectives should also be agreed upon, to support the constant development and progression and retention of all staff and to support Inspired's future talent requirements and continue to help everyone strive for excellence.

! A copy of objective setting form is available at the end of this Guide. Alternatively, SuccessFactors provides a platform to record objectives if available

Key Activities

- Ensure the priorities and goals for the team/department/Group (business area) are in place and have been shared with teams
- Establish and set any performance related objectives e.g. (Enrolment rates), grade attainment, student satisfaction, parent feedback, enrolment rates
- Objectives and goals should be SMART (Specific, Measurable, Achievable, Relevant, Timebound)
- Objectives should be aligned to the Group (business)/department/team/school strategy and plan
- Objectives should consider the Inspired Standards and any locally agreed assessment or quality assurance standards
- Objectives should include personal areas to develop as well as the Group/ (business)/department objectives
- Any personal growth objectives should be based on professional or personal development aspirations/ needs (gaps)

Critical Information Points:



1. For new colleagues this objective setting process must happen within the first 3 months of the appointment.
2. For anyone contracting these objectives must be clearly agreed in the Statement of Works (SOW)
3. For more experienced or outstanding Inspired staff, setting objectives may be less frequent (e.g. annually, Bi-annually or as required)
4. Objectives need to be re-visited throughout the year at regular intervals
5. Ideally, objectives should be limited to between 5 – 6. It is not a requirement to set objectives against each Inspired Standard/Competency

Accountabilities for Head/ Line Managers and/or Assessors	Accountabilities for Employees
Translate Group(business) strategy/priorities for staff	Ensure they are clear on the objectives and expectations required from them
Set clear expectations and objectives	Self-assess against the Inspired standards
Ensure objectives are SMART	Read and understand the standards expected
Use the Inspired Teaching and Leadership Standards	

STEP TWO – REVIEW AND PROVIDE FEEDBACK

At Inspired, high performance is a constant expectation. Once objectives have been established, it's expected that everyone strives to deliver these objectives and priorities to the very best of their ability and demonstrates the necessary standards or expectations that are relevant to their role at all times.

Waiting for long periods of time to evaluate performance is strongly discouraged and may lead to a failure to deliver the necessary levels of performance. As a consequence, the following practices are expected to occur on a regular basis:

- Regular reviews of performance against any agreed objectives, standards or expectations should take place, ideally once a month, in person or virtually with the Head/Line Manager (for academic roles this should be no less than once a term).
- Reviews could be formal and recorded, or they could be through giving and receiving informal feedback against different types of assessment or performance measurement
- Individuals are expected to take personal responsibility for gathering their own data and feedback on how they are performing

How to Review and Measure Ongoing Performance



There is extensive methodology for how assessments of performance could take place against the requirements of the role. The following are examples of evaluation techniques that exist within Inspired:

- Formal/informal observations of lesson delivery for teachers;
- Verbatim or recoded stakeholder feedback from students;
- Verbatim or recorded stakeholder feedback from parents;
- Verbatim or recorded stakeholder feedback from others;
- Quality, accuracy and timeliness of work submitted;
- Quantified achievement of targets (e.g. Financial);
- 180 degree or 360 degree from peers and team;
- Ad-hoc feedback or comments received on behaviours or outcomes
- External validation or assessment by independent 3rd parties;
- Through performance assessors employed by Inspired
- Students' learning and assessments
- Parent/student/company survey results

A combination of assessment methodologies should be used to provide detailed and well-rounded evaluation of performance. The output is that the evidence can illustrate the degree to which they demonstrates (i) Inspired Standards and Expectations (ii) Performance against any agreed objectives (iii) Delivery against any locally required professional or legal standards in practice, and (iv) Progress against any personal development goals that have been identified.

These are all examples of what information could be used to evaluate performance as well as team, Group and financial outcomes. Measuring performance may be unique to individual schools and regions, but it is important that Heads/ Line Managers take into account a range of performance measures in the process.

Minimum Standards for Roles

The frequency of performance assessments may vary depending on; The newness and experience of teachers; The historic Performance level; Group's Priorities and other factors. The following requirements are the minimum expectations of the PERFORM process:

For All New Teachers or Teachers in Probation

- Agree new objectives, self-assess against standards required and set any personal goals within 3 months of starting
- A formal review of performance before the end of any probation period
- Once a year a formal Performance and Development Review Meeting with a formal measure agreed upon
- At least 3 lesson observations within the first 6 months from either Head/ Academic and one class observation meeting during the probation period
- Quality Manager(s); Member of SLT or Line Manager; and/or trusted peer
- Informal 1-2-1's at least once a term (month) for the first year
- A probation review meeting

For Seasoned Teachers



- Once a year a formal Performance and Development Review meeting with appraiser and/or line manager (certain countries will have a two year cycle for academic roles)
- Peer walks and peer observation from time- to- time – a minimum of once a year
- For teaching staff at minimum of one lesson observation from the Head/ SLT or member of the Academic Quality Team a year

For Non-Teaching Staff

- Once a year a formal Performance and Development Review meeting
- Regular 1-2-1s once a monthly or each term if in a school role
- Informal half year performance and development review meeting with Line Manager or Head of Department

Accountabilities for Heads/ Line Managers	Accountabilities for Employees
Diarise one-to-ones to review performance regularly	Strive to deliver the agreed objectives to the highest possible standard
Take opportunities to provide informal feedback when appropriate	Highlight to their Head/ line manager if performance falls below expectations
Use a range of evaluation sources to monitor feedback and performance	Raise any issues where further support or training is required
Provide support to help improve performance	

Providing Support

Everyone needs support from time- to- time to be at their best and to continue to improve. At Inspired it is the responsibility of Heads/ line managers, and employees to ensure the right support is available.

Support should be agreed during formal or informal one-to-ones and PDR meetings. Examples of support could include the following list, but the most effective is always in the first instance constructive and honest feedback.

Support Available	Useful For
Constructive and Honest Feedback	When there are changes the individual could make to what they're doing, or how they're doing in order to improve their performance
360 Review	Gaining feedback from line managers; peers and employees using the Inspired Template
Additional training	Where the individual requires the knowledge
Mentoring	Where the individual could benefit from hearing how others have approached similar challenges; this could be in the form of 'buddying' them up with a more experienced senior teacher or member of the team
Coaching	Where the individual is competent, but needs help to think through new approaches
Clarifying	When expectations or objectives have changed and the individual lacks clarity on what is expected



Management Training	When the individual is new to a role of being a Head/ line manager and needs to develop the appropriate skills to get the best out of their team
External Courses	When there are requirements for in role performance to be supplemented by external bodies. This could be due to legal/ administrative requirements
Recognition/ Acknowledgement	When the individual is lacking confidence that they are doing the right thing
Collaboration	Where the individual could benefit from new insight or ideas, this could be supported through Inspired's global collaboration network

Giving Feedback to Improve Performance

Giving and receiving feedback is a key part of the performance and development review (PDRP) process. It is the most effective way to improve performance.

There are many ways that feedback can be given but the best opportunity is to do this either informally, in the moment, or in scheduled one-to-ones and PDR meetings.

One model for providing effective feedback is – **SBI**

1. S – Situation

Feedback should include the specifics of the situation. This should include what happened, what didn't happen, where, what the impact was, how this impacted performance.

2. B – Behaviour

Feedback should include examples of what the individual should have done differently or could chose to do differently to achieve a different result.

3. I - Impact

Feedback should include the benefits of what this change will deliver, and re-clarify how this feedback supports the required standards and expectations and objectives in place.

STEP THREE – THE OPPORTUNITY TO DELIVER

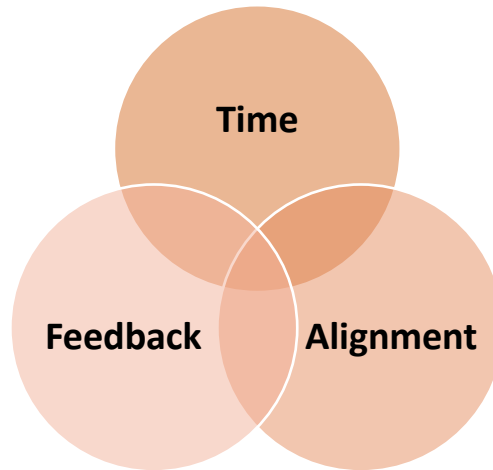
A high performance culture becomes embedded in a Company when individuals drive their own development. Constant self- assessment, feedback, self-reflection and self-evaluation are key parts of this to take personal responsibility for progress. At Inspired, every individual is expected to be responsible for driving their own development proactively and not waiting to be asked. This applies to all roles whether in the academic setting or not.

Individuals should constantly assess and reflect their own performance being proactive with requesting and gathering feedback on their performance and Heads/ line managers are expected to support the ongoing performance of their teams at all times.



This means that there is clarity of what's expected, that individuals are clear on what they need to work on, feedback is given honestly and constructively and sufficient time is given to enable the individual to deliver on the objectives.

Best practice suggests that all Heads/ Line Managers ensure they have met the key ingredients which enables the individual the best chance to perform at a high level and achieve their objectives:



- **Feedback** - Being clear on what can help improve delivery regularly and frequently
- **Time** – Giving appropriate deadlines
- **Alignment** – Being clear on how delivery will create great outcomes

Accountabilities for Heads/ Line Managers	Accountabilities for Employees
Ensure clear dates are communicated for individual to complete self-appraisal documentation	Continue to be aware of what's expected
Ensure individuals are clear on what they are expected to be delivering or improving upon	Ensure they measure the impact that they are having
	Keep track of any feedback or results they have received

STEP FOUR – REFLECT AND MEASURE PERFORMANCE

Holding formal performance reviews to measure objectives are an essential part of the process. They provide everyone with the opportunity to check-in on progress and receive direction and/or honest and constructive feedback. A **performance review template** is available in the **Appendix** to help give structure to conversations which can be used, which is also accessible via your own Success Factors portal – **See SuccessFactors User Guide**

Performance reviews should happen at least once every year for all staff, but best practice is that there is a formal review of progress at the half year point. For new Inspired colleagues this must be before the end of the probationary period (3 months).



Whilst high performance is a constant expectation, every employee should have a formal and documented performance review once a year. This is to ensure that everyone can know where they stand, what to work on, and discussions around future roles or new objectives can take place. Before this, the individual should have an opportunity to reflect on their performance during the measurement period, by completing a self-appraisal and share it with their Head/ line manager. This is an opportunity to honestly consider how they have delivered against the goals and objectives established at the beginning of the measurement period, and how they have improved their performance during this time or achieved against their objectives.

The Minimum Standards expected working within Inspired are:

- A minimum of once a year, every employee should have a formal opportunity to review performance with their Head/ line manager which is documented and recorded
- This should be undertaken using evidence and information gathered throughout the year, feedback against any agreed standards or objectives should be given
- The Head/ line manager and employee should agree on the level of performance that has been achieved
- Colleagues should submit a self-appraisal first, taking responsibility for evaluating their own levels of performance and achievement

Accountabilities for Heads/ Line Managers	Accountabilities for Employees
Ensure formal PDR meetings are scheduled	Prepare for formal meetings appropriately
Ensure clear feedback is given to the individual on their performance using feedback received	Attend PDR meetings when required
Ensure feedback and performance is documented clearly for record keeping	Participate openly and honestly in meetings
Ensure clarity on future objectives and expectations is communicated	Ensure they are clear on next steps

Measuring Performance

As a global network of over 70 schools and 7000 colleagues, there are differences in how performance is assessed depending on local expectations, professional standards and many other factors. However all measures of performance should fall within the following framework:

Overall Summary of Inspired Global Performance Ratings for All Roles

Rating	Not Meeting Expectations	Areas to Develop	On Track/Performing	Excellent/Outstanding
Summary	Most objectives are either not delivered, or delivered below the required standards/quality assurance	Performance is low and does not consistently meet the high standards, with important objectives or	Delivers a rounded performance against most objectives and all critical performance	Consistently delivers strong performance against all objectives and all standards expected



	measures or have required significant intervention and input from others to be achieved	targets not being achieved. Performance is inconsistent across either objectives, standards or both	areas or standards expected from the role Performance and standards are consistently positive	Delivers results beyond expectations and regularly contributes over and above the performance requirements and standards from their role
	This individual is evidencing few to none of the required Inspired standards or objectives expected from their role	This individual is evidencing some but not all of the requirements or is inconsistent in their performance against these Individuals here can often be new to role, and developing in the first 6 months	The individual is consistently demonstrating the proficiency and competencies expected in this role at all times This is strong performance	The Individual performing at this level is an exemplary role model within the department/school and across the Inspired Group consistently overachieving expectations and outperforming

Documenting Performance Conversations

There are different methods of documenting and capturing performance-based conversations across our network of >70 schools on 5 continents. This may vary depending on whether the review is formal, informal and annual or bi-annual.

However, the critical part is that performance ratings are agreed upon between Heads/ line managers and employees and clearly communicated so that each individual knows where they stand at the end of each measurement period.

From 2022 many performance conversations are available for capture online via the **SuccessFactors** employee portal. Please speak to your local HR team for more information.

Please refer to the Inspired **Global Performance and Development Review Form in the Appendix** to support the formal documentation of performance review conversations if required. These can be used informally during PDRs or one-to-ones that happen during the year as well as during formal review meetings.



EXAMPLE TIMINGS

	Northern Hemisphere	Southern Hemisphere
Create a plan, and set or re-establish performance and personal objectives	August - November	December - March
Evaluation and assessment of performance	Continuous	Continuous
Review Performance and Measure	May – June	October - November

Storage of Performance Conversations and Performance and Development Review Meetings

Because high performance is constant, it's important that performance ratings and performance conversations are recorded formally.

These should be available for all employees/staff to review and provide an important reference of how performance and personal progress has evolved over time.

All records of performance should be held in line with local data protection and storage requirements.

Poor Performance

In some instances, performance falls below the standards and expectations required at Inspired. Whilst all recruitment and performance processes seek to limit this happening there are occasions where performance is consistently not meeting expectations or has areas to develop. In certain cases, it may be necessary to at this point to use a more formal version of performance management (E.g. Performance Improvement Plan: PIP).

CONCLUSION

At Inspired Education our strength is in the unique individuality of our schools and their place in our communities. A shared and consistent goal is the pursuit of excellence – For students, Schools, Parents and each other

The **PERFORM** process and High Performance Guide is aimed at supporting a culture of high performance and creating a culture of excellence.

This document is intended to be a guide and incorporated into local policies and procedures, but each stage of PERFORM must be present within local policies and procedures.



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Appendix

INSPIRED OBJECTIVE SETTING TEMPLATE				
Objectives/Priorities What needs to be achieved?	Success Criteria What will the outcomes be?	School or Department Impact How will this support the objectives?	Timeframe When will this be delivered?	Support What support is required?
e.g.				



INSPIRED OFFLINE PERFORMANCE REVIEW/APPRaisal TEMPLATE

Name:	Job Title
School/Department/Business Area:	Time in role:
Head/ Line Manager:	Date:

Instructions [Offline Performance Review]:

1. Use your objectives form and the records you have from your one-to-ones to assess your performance against objectives set
2. Use the guide to the Guide to Inspired Performance Management or other local performance management processes to assess yourself against the standards
3. Send your form to your Head/ Line Manager who will then rate you against the same areas. This will be discussed with you in your performance review, and you will agree on an Overall Performance Rating together.
4. Don't forget to take last year's Objectives Form and your Personal Development Plan to your Performance and Development Review to help(help) guide the discussion around your development and performance

Instructions [Online]:

Please see the **SuccessFactors User Guide** for information on how to complete this process through the SuccessFactors Performance Portal or speak to your local HR Team

Performance Summary

<p>'What' Was Achieved? Vs. objectives</p> 	<p>'How' Was it Achieved? Vs. behaviours & Inspired Standards</p>
Self Performance ratings	Overall performance rating (Agreed with Line Manager)

