

Employee Performance Review Policy

Approved by: Kareena Taylor – Partner	Date: February 2025
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Next Review by: 31 st January 2026	Update: OFT Structure Chart included

Introduction

The vision of Our Future Tutoring Services Ltd (OFT) is to be recognized as an outstanding Tutoring Provider, leading the staff force through innovative tutoring solutions and focusing on achieving the best outcomes for our students in a safe, caring, and inspiring environment.

The success of this vision depends on every member of staff. There is substantial evidence that effective Performance Reviews and staff development contribute positively to student outcomes.

Performance Reviews ensure that managers fairly and equitably review the performance (both good and bad) of their employees. These reviews confirm that employees are delivering high-quality tuition to students, are competent in their roles, and treat colleagues with dignity and respect.

Performance Reviews also provide employees with the opportunity to provide feedback on concerns and areas for potential development to their managers, ensuring positive outcomes.

Performance Reviews are not a one-off event but an ongoing process throughout the employment contract.

This policy details OFT's staff Performance Review system, which is part of the wider Performance Management Framework. It enables managers and employees to engage in a meaningful Performance Review process and create an environment for success.

Policy Objectives

- Employee performance is assessed against values and behaviours.
- Employee performance is reviewed against previous objectives, resulting in a performance grade.
- Work-related objectives for the following year are agreed upon and aligned with OFT's objectives.
- Talent conversations allow employees to discuss career aspirations and identify potential development opportunities.
- Successors to critical posts are identified and developed.
- Employees and managers are informed of opportunities available through OFT's Performance Management Review Framework, ensuring both job satisfaction and increased tutoring quality to meet OFT's objectives.

Scope

This policy applies to all employees of OFT, whether PAYE, self-employed, or management.

It places the lead responsibility for performance management and development with line managers, who are supported by Human Resources (HR), Organizational Development, and Learning and Development teams.

OFT is committed to promoting and supporting the health and well-being of all employees. All employees with line management responsibilities should actively foster a positive approach to employee health and well-being.

Performance Review Cycle:

- The review cycle will begin in April and end in March of the following year
- Review meetings must be scheduled within the first month of the review cycle.
- Introduce a mid-cycle review or check-ins throughout the year at minimum six weekly intervals to monitor progress and address any emerging issues.
- During February of each year the final review must be conducted and finalized.

Benefits of the Performance Review for Reviewees:

The review process provides employees with the opportunity to:

- a. Engage in an honest and constructive discussion about progress against objectives and development needs.
- b. Receive constructive feedback in relation to their role and work.
- c. Establish objectives for the review cycle to guide activities.
- d. Align individual goals with those of OFT.
- e. Clarify their role within OFT.
- f. Build and sustain a positive working relationship with their reviewer.
- g. Discuss key issues in an uninterrupted setting.

Responsibilities

Responsibility of the Reviewer

- Schedule the review meeting at the beginning of the review cycle and ensure an appropriate venue is available.
 - Conduct a review meeting with each of their direct reports.
 - Provide feedback on the Reviewee's progress based on fair, objective, and measurable criteria.
 - Maintain a professional relationship with the Reviewee.
 - Complete and sign the final version of the Performance Review form and provide copies to the Reviewee, Director, and HR.
 - Ensure that agreed development needs and supporting interventions are implemented.
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- Specific modules will be developed for both reviewers and reviewees (e.g., how to give constructive feedback, unbiased performance assessment)

techniques) and reviewees (e.g., self-assessment preparation, setting career objectives).

- New managers or employees will receive introductory training.
- Human Resources will Identify the training platforms or team (e.g., Organizational Development or Learning and Development teams) responsible for the content and delivery.
- Participate in training sessions for Reviewers.

Responsibility of the Reviewee

- Fully engage in the Performance Review process and provide feedback on the process via established feedback mechanisms.
- Prepare for the review by completing section one of the Performance Review form with details of previous objectives and provide a copy to the Reviewer prior to the meeting.
- Present evidence of progress made towards objectives and identify achieved goals as well as any challenges encountered.
- Attend review meetings as requested and discuss achievements, successes, and progress.
- Maintain a professional relationship with the Reviewer.
- Discuss any development needs and support interventions required to achieve objectives.
- Sign the final Performance Review form as a form of agreement.
- Participate in training for Reviewees where required.

Responsibilities of Human Resources

- Maintain copies of all Performance Review forms in the appropriate personnel records.
- Identify organization-wide training needs based on review outcomes.
- Retain and secure performance review documents in accordance with legal requirements in relation to secured electronic storage, and restricted HR access.
- Regular Audits: Implement periodic audits to ensure compliance with data protection laws and organizational policies.

Role Specific Metrics

For Tutors and Mentors These may include student progress Indicators & feedback scores.

For office based or administrative staff this may include assessment of values and behaviours.

Department heads will develop role specific performance criteria

Raising Issues in Relation to the Performance Process / Outcome

- Any concerns raised by the Reviewer or Reviewee should be addressed by HR.
- If the Reviewer and Reviewee cannot reach an agreement during the review meeting, this should be documented within the Performance Review form.
- The reviewer and reviewee are encouraged to resolve minor disagreements during the review meeting.
- If no agreement is reached, the specific issues should be clearly documented in the Performance Review form.
- If there is no resolution the case should be referred to Human Resources within a 5 working days for mediation.
- Step 4: Escalation: If HR mediation does not resolve the issue, outline an escalation path to a higher-level manager or a designated conflict resolution committee.
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Disciplinary Action

Unreasonable refusal by a Reviewee or Reviewer to participate in the Performance Review process will be considered a disciplinary matter.

Equality Impact Assessment

An Equality Impact Assessment (EIA) has been conducted for this policy.

OFT is committed to promoting equality, diversity, and a supportive environment for all members of the community. This commitment includes ensuring that:

- The policy adheres to principles of plain English.
- The policy promotes positive duty concerning protected characteristics, including race, sex, disability, age, sexual orientation, religion or belief, gender reassignment, marriage and civil partnership, pregnancy, and maternity.
- All OFT policies undergo periodic review as part of the equality impact assessment process.



