



# Performance Management Policy

Date: September 2022

Review date: September 2024

Approved by the Advisory Board: October 2022

Linked with other policies:

- National Teachers' Standards
- Equality
- Pay

Signed:

*S. Day*

## Version Control

Version	Date of review/change(s)	Page and paragraphs affected	Summary of update
v2	September 2021	P3 Introduction para3	added: ECTs
		P3 Performance management	dates changed to <b>June / July to June / July</b>
		P4 para 8	added: / <b>learning walks</b>
		P5	Removed: Teachers can, however, expect to be formally observed on a minimum of three occasions for up to three quarters of an hour in any appraisal cycle and one day's advance notice will be given
		P5	drop in [observations] changed to: <b>learning walk [observations]</b>
V3	September 2022	P3 <b>Appointing Appraisers</b>	'will' changed to 'can' [appraise other...]
		P4 <b>Teaching Staff</b>	'and a member of the Advisory Board' added (re. setting objectives)
		P4 <b>Reviewing Performance</b> Classroom Observation Paragraph 1	'observation' changed to 'monitoring' 'collaboratively and discussing' [assessing] added' 'Observations/learning walks' changed to 'monitoring'
		P5 (Classroom observation cont.) Paragraph 1	'Observation' changed to 'monitoring'  [whole school learning walks] will be 'published at the start of the academic year' replacing 'weekly'
		P5 (Classroom observation cont.) paragraph 3	'learning walk observations' changed to 'monitoring'
		P5 <b>Reviewing Support Staff Performance</b>	'evidence gathering and assessment' changed to 'monitoring'  [for teaching assistants] 'data' changed to 'monitoring'
		P5 <b>Feedback</b>	'learning walk observations' changed to 'monitoring'
		P6 <b>Annual Assessment</b> Bullet point 6 added	If an increase in pay has been recommended
		P6 <b>Retention</b>	Six years changed to 'the current academic year plus 5 years'
		Appendices one, two and three added	Performance Management Record templates for Teachers, Teaching Assistants, Support Staff

This document is a statement of the aims, principles and strategies to ensure effective procedures for performance management at All Saints School. The policy was developed through a process of consultation with staff at All Saints School and was formally adopted by staff in September 2019.

## **Introduction**

This policy sets out the framework for a clear and consistent assessment of the overall performance of staff at the school and for supporting their development within the context of the school's plan for improving educational provision and performance, the national standards expected of teachers and the role and expectations of support staff.

The appraisal system in this school is intended to be a supportive and developmental process designed to ensure that all members of staff:

- have the skills and support they need to carry out their role effectively;
- can continue to improve their professional practice and to develop further in their role.

This policy applies to all staff employed by the school except those on contracts of less than one term, teachers undergoing induction (i.e. ECTs) and those who are the subject of capability procedures or a period of probationary service.

The school is mindful of its obligations under the Equality Act 2010 and this policy will be applied fairly and consistently to all staff employed at the school, with the exceptions outlined above.

## **The Performance Management Period**

The Performance Management period will run for twelve months from June / July to June / July for all staff.

Employees who are engaged on a temporary or fixed term contract likely to last for less than one year will have their performance managed in accordance with the principles underpinning this policy. The length of the appraisal period will be determined by the known or likely duration of the contract.

## **Appointing Appraisers**

The Headteacher will have their performance management undertaken by the Directors, and will include the setting of objectives.

The Headteacher and Deputy Headteachers can appraise other members of staff.

## **Setting Objectives**

### **General**

Objectives for each member of staff will be set before, or as soon as practicable after, the start of each appraisal period. The objectives set for each appraisee will be 'SMART' (i.e. specific, measurable, achievable, realistic and time-bound) and will be appropriate to the individual's role and level of experience. It may be determined that specific objectives require a longer time span than a single appraisal period, in which case appropriate milestones towards the achievement of such objectives will be built in, in order to monitor progress within each appraisal period.

The appraiser and appraisee will seek to agree the objectives. Where this is not possible, the appraiser will determine the objectives. Objectives may be revised if circumstances change.

## **Teaching Staff**

The Headteacher's objectives will be set by the Headteacher, Directors and a member of the Advisory Board. The Headteacher will have their leadership and management responsibilities observed and assessed as part of the performance management process.

The objectives set for each teacher will, if achieved, contribute to the school's plans for improving the school's educational provision and performance and improving the education of students at the school. This will be ensured by quality assuring all objectives against the School Development Plan and may be individual, team, year or whole school objectives. There should be no more than four objectives set for an annual cycle.

Teachers are informed of the National Teachers' Standards against which their performance will be assessed at the start of each appraisal period. The Teachers' Standards were introduced in September 2012, (and updated in June 2013), to set a clear baseline of expectations for the professional practice and conduct of teachers. The Headteacher must consider whether certain teachers should also be assessed against other sets of standards published by The Secretary of State that are relevant to them.

## **Support Staff**

It is recognised that the process of objective setting will be more appropriate to some support staff roles than others and that therefore it may not be practicable in all cases to set formal objectives. Although the appraisal process may require adaptation for different roles, the Headteacher will continue to ensure that all employees have the opportunity to have their performance reviewed on an annual basis.

Objectives for each teaching assistant are set at the beginning of the appraisal period. Objectives will relate to the school's plans for improving educational provision where relevant to the individual's role; otherwise (or in addition) they may relate to progress in a specific task and/or professional development. The TA standards will be used to agree targets. There should be no more than four objectives set for an annual cycle.

## **Reviewing Performance**

### **Classroom Observation**

This school believes that monitoring of classroom practice and other responsibilities is important both as a way of assessing collaboratively and discussing teachers' and teaching assistants' performance in order to identify any particular strengths and areas for development they may have and for gaining useful information which can inform school improvement more generally. All monitoring will be carried out in a supportive fashion.

Teachers' performance will be regularly observed but the amount and type of classroom monitoring will depend on the individual circumstances of the teacher and the overall needs of the school. Whole school learning walks will be published at the start of the academic year and focussed on areas of the school's improvement plan. Throughout the course of the year all staff will be included in the learning walks. Different arrangements will apply to any staff whose performance is causing concern.

The length and frequency of monitoring will vary depending on specific circumstances and staff will receive no advance notice. Monitoring may relate back to the appraisal period for an individual if the drop-in highlights certain evidence or concerns.

### **Reviewing Support Staff Performance**

The process of reviewing support staff performance may involve a mixture of informal and formal monitoring. For teaching assistants, monitoring will normally consist of evidence of student work or progress. For other support staff there may be evidence from project documentation or from co-workers, or managers which can feed into the process.

### **Development and Support**

Performance Management is designed to be a supportive process which will be used to inform continuing professional development. The school wishes to encourage a culture in which all members of staff take responsibility for improving their performance through appropriate professional development. Professional development will be linked to school improvement priorities and to the ongoing professional development needs and priorities of individual members of staff.

### **Feedback**

All members of staff will receive constructive feedback on their performance throughout the year and as soon as practicable after monitoring has taken place or other evidence has come to light. Feedback will highlight particular areas of strength as well as any areas that need further development. Where there are concerns about any aspects of the individual's performance the appraiser will arrange to meet the member of staff to:

- give clear feedback about the nature and seriousness of the concerns;
- give the member of staff the opportunity to comment and discuss the concerns;
- agree any support (e.g. coaching, mentoring, structured observations for teachers), that will be provided to help address those specific concerns;
- make clear how, and by when, the appraiser will review progress;
- explain the implications and process if no – or insufficient – improvement is made.

The appraisal plan will be revised as necessary to reflect any changes, such as to the objectives or planned development activities.

When progress is reviewed, if the appraiser is satisfied that the appraisee has made, or is making, sufficient improvement, the appraisal process will continue as normal, with any remaining issues continuing to be addressed through that process.

### **Transition to Capability Procedures**

If the appraiser is not satisfied with progress, the member of staff will be notified in writing that the appraisal system will no longer apply and that their performance will be managed under the capability procedure. They will be invited to a formal capability meeting in accordance with the school's adopted procedure.

### **Annual Assessment**

Each member of staff's performance will be formally assessed in respect of each appraisal period.

This assessment is the end point to the annual appraisal process, but performance and development priorities will be reviewed and addressed on a regular basis throughout the year in interim meetings which will take place each term

The appraisee will receive as soon as practicable following the end of each appraisal period – and have the opportunity to comment in writing on – a written appraisal report. Teachers will receive their written appraisal reports by 31 July (30th September for the Headteacher). The Performance Management documentation will include:

- details of the individual's objectives for the appraisal period in question;
- an assessment of the appraisee's performance of their role and responsibilities against their objectives and,
- for teachers, the relevant standards or,
- for support staff, their job description and any occupational or national standards deemed relevant;
- an assessment of the appraisee's training and development needs and identification of any action that should be taken to address them.
- If an increase in pay has been recommended

The assessment of performance and of training and development needs will inform the planning process for the following appraisal period.

### **Confidentiality**

The appraisal process will be treated with confidentiality. However, the desire for confidentiality does not override the need for the Headteacher to quality assure the operation and effectiveness of the system.

### **Monitoring and Evaluation**

The Headteacher will monitor the operation and evaluate the effectiveness of the school's performance management arrangements.

The Headteacher will provide the Directors with a written annual report on the performance management process.

### **Retention**

The Headteacher will ensure that all written appraisal records are retained in a secure place for the current academic year plus 5 years and then destroyed.

Appendix one: Performance Management record

**Performance Management Record – Teacher**

<b>Reviewee Name:</b>	<b>Reviewer Name:</b>
<b>Job Title:</b>	<b>Job Title:</b>
<b>Period Covered by Review from June 2019 to June 2020</b>	

<b>Key strengths / contributions to acknowledge and celebrate</b>

<b>Current objectives</b>				
<b>Objectives</b>	<b>Objectives</b>	<b>Met / In Part / Not Met</b>	<b>Summary of success / achievements through the year.</b>	<b>Evidence obtained from the interim meetings</b>
<b>1) Student Outcomes</b>				
<b>2) Classroom Practice</b>				
<b>3) Wider Professional Development</b>				

4) Other				
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**Review of Self-Evaluation against Teacher Standards**

Criterion	Level 1	Level 2	Level 3	Level 4
Teachers' Standards	All being met	The vast majority are met and making good progress towards those not met.	Some are met but the majority are not being met	Clearly not being met
Record of evidence				
<b>Key Strengths</b>			<b>Areas requiring further Professional Development</b>	

CPD requirements (please provide specific details)

Space for general comments

A copy of these notes should be retained by the reviewer and reviewee

Signature of Reviewer: \_\_\_\_\_

Date:

Signature of Reviewee: \_\_\_\_\_

Date:



**Performance Management Record – TA**

<b>Reviewee Name:</b>	<b>Reviewer Name:</b>
<b>Job Title:</b>	<b>Job Title:</b>
<b>Period Covered by Review from June ..... to June .....</b>	

<b>Key strengths / contributions to acknowledge and celebrate</b>

<b>Current objectives</b>				
<b>Objectives</b>	<b>Objectives</b>	<b>Met / In Part / Not Met</b>	<b>Summary of success / achievements through the year.</b>	<b>Evidence obtained from the interim meetings</b>
<b>5) Student Outcomes</b>				
<b>6) Classroom Practice</b>				

7) Wider Professional Development				
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**Objectives for the new review period**

Objectives	Objectives	Timescale	Success Criteria	CPD / support required
1) Student Outcomes				
2) Classroom Practice				
3) Wider professional development				

Space for general comments including CPD

A copy of these notes should be retained by the reviewer and reviewee

Signature of Reviewer: \_\_\_\_\_

Date:

Signature of Reviewee: \_\_\_\_\_

Date:

Appendix three

**Performance Management Record – Support Staff**

<b>Reviewee Name:</b>	<b>Reviewer Name:</b>
<b>Job Title:</b>	<b>Job Title:</b>
<b>Period Covered by Review from June ..... to June .....</b>	

<b>Key strengths / contributions to acknowledge and celebrate</b>

<b>Current objectives</b>				
<b>Objectives</b>	<b>Objectives</b>	<b>Met / In Part / Not Met</b>	<b>Summary of success / achievements through the year.</b>	<b>Evidence obtained from the interim meetings</b>
1)				
2)				
3)				

<b>Objectives for the new review period</b>
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Objectives	Objectives	Timescale	Success Criteria	CPD / support required
1)				
2)				
3)				

Space for general comments including CPD

A copy of these notes should be retained by the reviewer and reviewee

Signature of Reviewer: \_\_\_\_\_

Date:

Signature of Reviewee: \_\_\_\_\_

Date: