



## Performance Management Policy

Policy Owner

The Governing Body of The Elmgreen School

Application of the Policy

The policy applies to the head teacher and to all teachers employed by the school except teachers on contracts of less than one term, those undergoing induction (*ie NQTs*) and those who are the subject of capability procedures.

### PURPOSE

This policy sets out the framework for a clear and consistent assessment of the overall performance of teachers and the head teacher and for supporting their development needs within the context of the school's improvement plan and their own professional needs. Where teachers are eligible for pay progression, the assessment of performance throughout the cycle against the performance criteria specified in the statement will be the basis on which the recommendation is made by the reviewer.

This policy should be read in conjunction with the school's pay policy which provides details of the arrangements relating to teacher's pay in accordance with the School Teachers' Pay and Conditions Document.

Links to school improvement, school self evaluation and school development planning

To comply with the requirement to show how the arrangements for performance management link with those for school improvement, school self-evaluation and school development planning and to minimise workload and bureaucracy the performance management process will be the main source of information as appropriate for school self-evaluation and the wider school improvement process.

Similarly, the school improvement and development plan and the school's self evaluation form are key documents for the performance management process.

All reviewers are expected to explore the alignment of reviewees' objectives with the school's priorities and plans. The objectives should also reflect reviewees' professional aspirations.

Consistency of treatment and fairness

The Governing Body is committed to ensuring consistency of treatment and fairness in the operation of performance management.

To ensure this the following provisions are made in relation to moderation, quality assurance and objective setting.

Quality assurance

The head teacher has determined that s/he will delegate the reviewer role for some or all teachers for whom s/he is not the line manager. In these circumstances the head teacher will moderate a sample of planning statements to check that the plans recorded in the statements of teachers at the school:

are consistent between those who have similar experience and similar levels of responsibility; comply with the school's performance management policy, the regulations and the requirements of equality legislation

The Governing Body will nominate (up to three governors - state the number) who will not be involved in the head teacher's performance management or any appeal regarding the head teacher's performance management to ensure that the head teacher's planning statement is consistent with the school's improvement priorities and complies with the school's performance management policy and the Regulations.

The Governing Body will review the quality assurance processes when the performance policy is reviewed.

Objective setting

The objectives set will be rigorous, challenging, achievable, time-bound, fair and equitable in

relation to teachers with similar roles/responsibilities and experience, and will have regard to what can reasonably be expected of any teacher in that position given the desirability of the reviewee being able to achieve a satisfactory balance between the time required to discharge his professional duties and the time required to pursue his personal interests outside work, consistent with the school's strategy for bringing downward pressure on working hours. They shall also take account of the teacher's professional aspirations and any relevant pay progression criteria. They should be such that, if they are achieved, they will contribute to improving the progress of students at the school.

The reviewer and reviewee will seek to agree the objectives but where a joint determination cannot be made the reviewer will make the determination.

In this school:

all teachers, including the headteacher, will have no more than three objectives

all teachers, including the headteacher, will have a whole school objective

all teachers, including the headteacher, will have a team objective, as appropriate

all teachers, including the headteacher, will have a personal objective

Though performance management is an assessment of overall performance of teachers and the head teacher, objectives cannot cover the full range of a teacher's roles/responsibilities. Objectives will, therefore, focus on the priorities for an individual for the cycle.

### Reviewing Progress

At the end of the cycle assessment of performance against an objective will be on the basis of the performance criteria set at the beginning of the cycle. Good progress towards the achievement of a challenging objective, even if the performance criteria have not been met in full, will be assessed favourably.

The performance management cycle is annual, but on occasions it may be appropriate to set objectives that will cover a period over more than one cycle. In such cases, the basis on which the progress being made towards meeting the performance criteria for the objective will be assessed at the end of the first cycle and will be recorded in the planning and review statement at the beginning of the cycle.

### Appeals

At specified points in the performance management process teachers and head teachers have a right of appeal against any of the entries in their planning and review statements. Where a reviewee wishes to appeal on the basis of more than one entry this would constitute one appeal hearing. Details of the appeals process are covered in the school's pay policy.

## Confidentiality

The whole performance management process and the statements generated under it, in particular, will be treated with strict confidentiality at all times. Only the reviewee's line manager or, where s/he has more than one, each of her/his line managers will be provided with access to the reviewee's plan recorded in her/his statement, upon request, where this is necessary to enable the line manager to discharge her/his line management responsibilities. Reviewees will be told who has requested and has been granted access. The Senior Leader with responsibility for performance management will be responsible for administering the central record and will therefore have access to all statements.

The details relating to CPD will be made available to the member of the Senior Team responsible for CPD.

## Training and support

The school's CPD programme will be informed by the training and development needs identified in the training annex of the reviewees' planning and review statements.

The governing body will ensure in the budget planning that, as far as possible, appropriate resources are made available in the school budget for any training and support agreed for reviewees.

An account of the training and development needs of teachers in general, including the instances where it did not prove possible to provide any agreed CPD, will form a part of the head teacher's annual report to the governing body about the operation of the performance management in the school.

With regard to the provision of CPD in the case of competing demands on the school budget, a decision on relative priority will be taken with regard to the extent to which: (a) the CPD identified is essential for a reviewee to meet their objectives; and (b) the extent to which the training and support will help the school to achieve its priorities. The school's priorities will have precedence. If (whether for resource reasons or other practical considerations) the school cannot provide the support recorded in the planning statement, the reviewee and reviewer should meet mid cycle to agree a sensible way forward and amend the reviewee's statement as appropriate.

## Appointment of reviewers for the head teacher and Senior Team

The governing body have appointed a Senior Team Review Committee to set and review the objectives of the head teacher and to make recommendations on the level of pay of the head teacher and senior staff within the parameters laid out in the school pay policy. The committee will comprise three governors one of whom will be the Chair of Governors. The vice chair of governors is held in reserve in order to hear any appeal from the head teacher concerning their objectives or decisions relating to pay.

Where a head teacher is of the opinion that any of the governors appointed by the governing body under this regulation is unsuitable for professional reasons, s/he may submit a written request to the governing body for that governor to be replaced, stating those reasons.

#### Appointment of School Improvement Partner or External Adviser

The local authority has appointed a School Improvement Partner for the school, who will provide the Governing Body with advice and support in relation to the management and review of the performance of the head teacher.

#### Appointment of reviewers for teachers

In the case where the head teacher is not the teacher's line manager, the head teacher may delegate the duties imposed upon the reviewer, in their entirety, to the teacher's line manager. In this school the head teacher has decided that the head teacher will be the reviewer for those teachers s/he directly line manages and will delegate the role of reviewer, in its entirety, to the relevant line managers for some or all other teachers.

Where a teacher has more than one line manager the head teacher will determine which line manager will be best placed to manage and review the teacher's performance.

Where a teacher is of the opinion that the person to whom the head teacher has delegated the reviewer's duties is unsuitable for professional reasons, s/he may submit a written request to the head teacher for that reviewer to be replaced, stating those reasons.

Where it becomes apparent that the reviewer will be absent for the majority of the cycle or is unsuitable for professional reasons the head teacher may perform the duties himself/herself or delegate them in their entirety to another teacher. Where this teacher is not the reviewee's line manager the teacher will have an equivalent or higher status in the staffing structure as the teacher's line manager.

A performance management cycle will not begin again in the event of the reviewer being changed.

All line managers to whom the head teacher has delegated the role of reviewer will receive appropriate preparation for that role.

#### THE PERFORMANCE MANAGEMENT CYCLE

The performance of teachers must be reviewed on an annual basis. Performance planning and reviews must be completed for all teachers by 31 October and for head teachers by 31 December.

The performance management cycle in this school, therefore, will run from 1 November to 31 October for teachers, and from 1 January to 31 December for the head teacher.

Teachers who are employed on a fixed term contract of less than one year, will have their performance managed in accordance with the principles underpinning the provisions of this policy. The length of the cycle will be determined by the duration of their contract.

Where a teacher starts their employment at the school part-way through a cycle, the head teacher or, in the case where the teacher is the head teacher, the governing body shall determine the length of the first cycle for that teacher, with a view to bringing his cycle into line with the cycle for other teachers at the school as soon as possible.

Where a teacher transfers to a new post within the school part-way through a cycle, the head teacher or, in the case where the teacher is the head teacher, the governing body shall determine whether the cycle shall begin again and whether to change the reviewer.

#### Retention of statements

Performance management planning and review statements will be retained for a minimum period of 6 years.

#### Monitoring and evaluation

The governing body will monitor the operation and outcomes of performance management arrangements.

The head teacher will provide the governing body with a written report on the operation of the school's performance management policy annually. The report will not contain any information which would enable any individual to be identified. The report will include:

the operation of the performance management policy;  
the effectiveness of the school's performance management procedures;  
teachers' training and development needs.

### Review of the policy

The Governing Body will review the performance management policy every school year.

The Governing Body will take account of the head teacher's report in its review of the performance management policy. The policy will be revised as required to introduce any changes in regulation and statutory guidance to ensure that it is always up to date.

The Governing Body will seek to agree any revisions to the policy with the recognised trade unions having regard to the results of the consultation with all teachers.

To ensure teachers are fully conversant with the performance management arrangements, all new teachers who join the school will be briefed on them as part of their introduction to the school.

### Access to documentation

Copies of the school improvement and development plan and SEF are published on the school's shared area.

Policy adopted by Governing Body: November 2011