



Oxenhope Church of England Primary School

**Performance Management Policy**  
**September 2019**



Created By:	Date:	Next Review Date:
A Jones	September 2019	July 2022

## 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 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 and aspirations.

Where teachers are eligible for pay progression, ie. From Main Scale1 through to 6 (M6) through the Threshold and then through the three Upper Pay Scales (UPS), 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.

Progression from Main Scale1 through to 6 (M6) through the Threshold and then through the three Upper Pay Scales (UPS) is dependent on two consecutive, successful Performance Management Reviews. 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

The arrangements for performance management link with those for school improvement, school self-evaluation and school development planning.

They are set in the context of the underlying framework of professional standards. (See "Teachers' Standards" DfE September 2012.) 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.

### Quality assurance:

The head teacher has determined that they 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 all the 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 review the quality assurance processes when the performance policy is reviewed.

## OBJECTIVE SETTING

The objectives set will be rigorous, challenging, specific, measurable, achievable, time bound, fair and equitable in relation to teachers with similar roles/responsibilities and experience.

They 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 her/his professional duties and the time required to pursue his personal interests outside work.

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 pupils 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 order to focus on relevant priorities and having regard both to workload and the underlying framework of professional standards, all teachers, including the head teacher, will have no more than three objectives per cycle of which two may reflect a whole school/team objective.

Part time teachers working at 0.6 (Full Time Equivalent) or less will only have two objectives, unless they are Upper Pay Scale, in which case they will have three objectives. 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. At the review stage it will be assumed that those aspects of a teacher's roles/responsibilities not covered by the objectives or any amendment to the statement which may have been necessary in accordance with the provisions of the regulations have been carried out satisfactorily.

Before, or as soon as practicable after the start of each appraisal period, each teacher will be informed of the standards in the context of which that teacher's performance in that appraisal period will be assessed. All teachers should be assessed using the set of standards contained in the document called "Teachers' Standards" published in July 2011.

The Headteacher or governing body (as appropriate) will need to consider whether certain teachers should also be assessed against other sets of standards published by the Secretary of State that are relevant to them.

## 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.

There will be a mid-year review meeting to evaluate progress towards objectives

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.

### CONFIDENTIALITY

The whole performance management process and the statements generated under it, in particular, will be treated with strict confidentiality at all times.

### TRAINING AND SUPPORT

Performance management is a supportive process which will be used to inform continuing professional development (CPD).

The school wishes to encourage a culture in which all teachers take responsibility for improving their teaching through appropriate professional development. Professional development will be linked to school improvement priorities and to the ongoing professional development needs and priorities of individual teachers.

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.

### Feedback:

Teachers will receive constructive feedback on their performance throughout the year and as soon as possible after any observations have taken place or other evidence has been considered.

Feedback will be of a developmental nature and will highlight particular areas of strength as well as any areas that may need attention, including guidance on how improvements may be achieved. Where appropriate, revised objectives and priorities may be proposed to reflect outcomes from the appraisal process. Where the reviewer is concerned that teachers are not likely to meet their objectives, this should be discussed with the teacher as early as possible in the cycle.

### Teachers Requiring Additional Support

In the event of significant and/or recurring concerns about a teacher's performance being identified, arrangements will be made to establish a support plan with a view to securing the improvements required.

A support plan may be implemented as part of the appraisal procedure at any time where this becomes appropriate and does not need to await the formal annual assessment. The Headteacher, appraiser or nominated line manager will arrange a structured meeting with the teacher for this purpose and will invite the teacher to be accompanied by a union representative or workplace colleague.

The meeting will:

- give clear feedback to the teacher about the nature and seriousness of the concerns;
- clarify any previous action taken to address the concerns;
- give the teacher the opportunity to comment and discuss the concerns;
- agree any support (e.g. coaching, mentoring, structured observations, teaching resources) that will be provided to help address these specific concerns;
- make clear how, and by whom, progress will be monitored and when it will be reviewed;
- explain the implications and process that will apply if no, or insufficient, improvement is made.

The time period for making improvement will depend upon the individual circumstances but will have regard to the nature and seriousness of the concerns, any support that has been or is to be provided and any other relevant factors.

A structured support plan will not normally be of less than six weeks' duration.

When progress is reviewed, if the appraiser is satisfied that the teacher 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. The period of monitoring may be extended in situations where there is good reason to do so.

### Transition to Capability Procedure

If no, or insufficient improvement has been made after the monitoring period, the teacher will be notified in writing and invited to a formal capability meeting. The capability procedures will be conducted in accordance with BDAT procedures.

### REVIEWERS FOR THE HEAD TEACHER

The Governing Body is the reviewer for the head teacher and to discharge this responsibility on its behalf, may appoint 2 or 3 governors.

BDAT Primary Directors also review for the head teacher.

Where the 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.

### REVIEWERS FOR TEACHERS

The head teacher will review teacher's performance management.

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. These could be Key Stage Leads or NQT mentors.

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.

### 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.

There must be a mid-year review meeting to evaluate progress towards objectives.

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.

### PERFORMANCE MANAGEMENT FOR SUPPORT, CLERICAL, PASTORAL AND OFFICE STAFF

There is no legal requirement for schools to carry out performance management for these members of staff. However, at Oxenhope Church of England Primary School we believe that in order for our school to progress and impact effectively on children's education, all staff will take part in a school developmental based performance management process which will mirror teaching staff's.

Support, clerical and office staff's objectives will be from the school development plan and also represent personal career aspirations.

These staff members will have 3 meeting points for their performance management – Objective setting, mid-year review and closing review. The school business manager will lead these review meeting under the guidance of the head teacher.

Support staff will undertake observations in order to gather evidence to prove the meeting of objectives.