



## PERFORMANCE MANAGEMENT POLICY

For all teaching staff, including the Head of School

### **Associated Policies:**

- Trust Pay Policy
- Trust Staff Conduct and Grievance
- School's Requires Improvement to Good and Good to Outstanding Learning and Teaching Policy
- School's Red Lines Document
- School's Capability Policy
- Teachers Standards: [www.education.gov.uk/schools/teachingandlearning/reviewofstandards](http://www.education.gov.uk/schools/teachingandlearning/reviewofstandards)

### **Application of the Policy**

The policy applies to the Head of School and to all teachers employed by Bohunt Education Trust, except those on contracts of less than one term, NQTs who are subject to national standards, which if attained will lead to being eligible for performance management in their second and subsequent years of teaching, and those who are the subject of capability procedures.

### **Purpose of the Policy**

The policy sets out the framework for a clear and consistent assessment of the overall performance of the Trust's staff and for supporting their development needs within the context of the (Member) School 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 (STPCD, 2015).

### **Links to School Self-Evaluation and School Improvement Plan**

The arrangements for performance management link with those for school improvement and school evaluation. Likewise the School Improvement Plan is a key document for the performance management process. All reviewers are expected to ensure that reviewees' objectives align with the processes outlined above and also reflect reviewees' professional aspirations.

### **Consistency of Treatment and Fairness**

The Trust Board 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:

- The Trust CEO together with the Local Governing Body (LGB), is the reviewer for the Head of School and will appoint up to three governors to discharge this responsibility on its behalf. Where the Head of School is of the opinion that any of the governors appointed by the governing body is unsuitable for professional reasons, he may submit a written request to the governing body for that governor to be replaced stating those reasons.
- The Head of School has determined that he will delegate the reviewer role for all teachers for whom he is not the line manager.
- Reviewers will be, on the whole, a TLR holder within the subject, for the staff whose main teaching load lies within the subject area. TLR holders will, in turn, be reviewed by more senior TLR holders or their Leadership Group line manager. Where a teacher is of the opinion that their reviewer is unsuitable for professional reasons, they may submit a written request to the Head of school 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 of School will delegate the reviewer's duties in their entirety to another teacher who has 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 reviewers will receive appropriate preparation for the role.

The Head of School, HR personnel or appropriate person on the Leadership Group will moderate 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 and the regulations and requirements of equality legislation. Further, targets set will be moderated to ensure sufficient and appropriate challenge and to allow staff to progress to higher pay grades.

### **Objective Setting**

The Heads of Member Schools are responsible for agreeing and reviewing performance objectives for all employees other than those reporting directly to the CEO; the Heads of School are line managed by the CEO who will consult with the appropriate LGB and, if appropriate, the Trust Board in the setting and review of performance objectives.

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 necessity of the reviewee being able to achieve a satisfactory life/work balance. They should also take account of the teacher's professional aspirations and any relevant pay progression criteria. They should contribute to improving the progress of students at the school through personalisation.

The reviewer and reviewee will seek to agree the objectives but where a joint determination cannot be made the reviewer will make the determination. Objectives set should reflect both the school and team plans and the needs and aspirations of the individual teacher. In addition the Head of School, school Leadership Team and those teachers who hold TLR points will have an objective that relates to leadership. The theme of all objectives set therefore will reflect the school's drive towards personalisation.

All classroom observation will be undertaken in accordance with the performance management regulations and the classroom observation protocol that is appended to this policy in Annex 1. 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 management criteria have not been met in full will be assessed favourably.

## **Performance Management of the Head of School**

### ***New Appointment***

14.1 The CEO, in consultation with the Trust Board and LGB, will exercise his discretion in securing the appointment of their preferred candidate and set pay range.

### ***Serving HoS***

14.3 The LGB together with the CEO will agree performance objectives with the individual Head of Member School. The objectives will be agreed in the autumn term as will a review of the previous year's performance against existing objectives and make recommendations as to any salary increase when objectives are met.

14.4 The general appeals policy will apply to the Head of School but s/he will only have the right of appeal to the Trust Board. The Head of School is entitled to make a written statement to contribute to their performance review.

14.5 The terms of reference for the Head of School will be determined from time to time by the CEO with reference to the LGB and Trust Board if appropriate

## **Progression**

Please see the Pay Policy for information regarding progression on the Main Pay Scale and on the Upper Pay Scale.

## **Appeals**

The Head of School and teachers have a right of appeal against any of the entries in their planning and review statements.

### ***Appeal by a teacher NOT line managed by the Head of School***

In the event of an appeal by a teacher this should be in writing to the Head of School stating the grounds of the appeal within ten working days of the statement being written.

### ***Appeal by a teacher line managed by the Head of School***

In the case of an appeal being lodged by a reviewee who is reviewed by the Head of School the appeal should be addressed to the CEO and Chair of the LGB.

### ***Appeal by the Head of School***

The Head of School can appeal to the Trust Board.

The decisions made in the case of any appeal are binding on all parties.

## **Confidentiality**

The whole performance management process will be treated with confidentiality at all times. However, to ensure that Performance Management information is used to inform the School Plan and CPD certain pages need to be shared more widely. Footnotes for each section detail the circulation allowances.

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

## **Training and Support**

The school's CPD programme will be informed by the training and development needs identified in the training section of the reviewee's planning and review statements. The LGB will ensure that the budget planning process ensures that appropriate resources are made available for any training and support agreed for reviewees. In allocating resources to meet training needs the school's priorities will need to be taken account of together with an individual teacher's priorities. Teachers should not be held accountable for failing to make good progress towards meeting their performance criteria where adequate support has not been provided.

### **The Performance Management Cycle**

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

The performance management cycle will therefore run from the 31 October to the 31 October in the subsequent academic year. In the case of the Head of School the cycle will run from the 31 December to the 31 December in the subsequent academic year. 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 part way through the cycle the Headteacher shall determine the length of the first cycle for that teacher. In addition outlining the policy will be part of the induction programme for all new staff. Where a teacher transfers to a new post within the school part way through the cycle, the Headteacher shall determine whether the cycle shall begin again and whether to change the reviewer.

### **Monitoring and Evaluation**

The Trust Board will review the performance management policy when changes to it are made, or when there are any changes in regulation or statutory guidance. The Trust Board will seek to agree any revisions to the policy with the recognised professional associations having regard to the results of any consultation with all teachers.

### **Appendix One: Observations**

#### ***Observations database can be found here:***

[https://docs.google.com/a/bohunt.hants.sch.uk/forms/d/1PfAyMAp2dxU0SMApY7GGEZ5hQIMaZrz74-18IMrYo/viewform?usp=send\\_form](https://docs.google.com/a/bohunt.hants.sch.uk/forms/d/1PfAyMAp2dxU0SMApY7GGEZ5hQIMaZrz74-18IMrYo/viewform?usp=send_form)

- Will vary according to school.

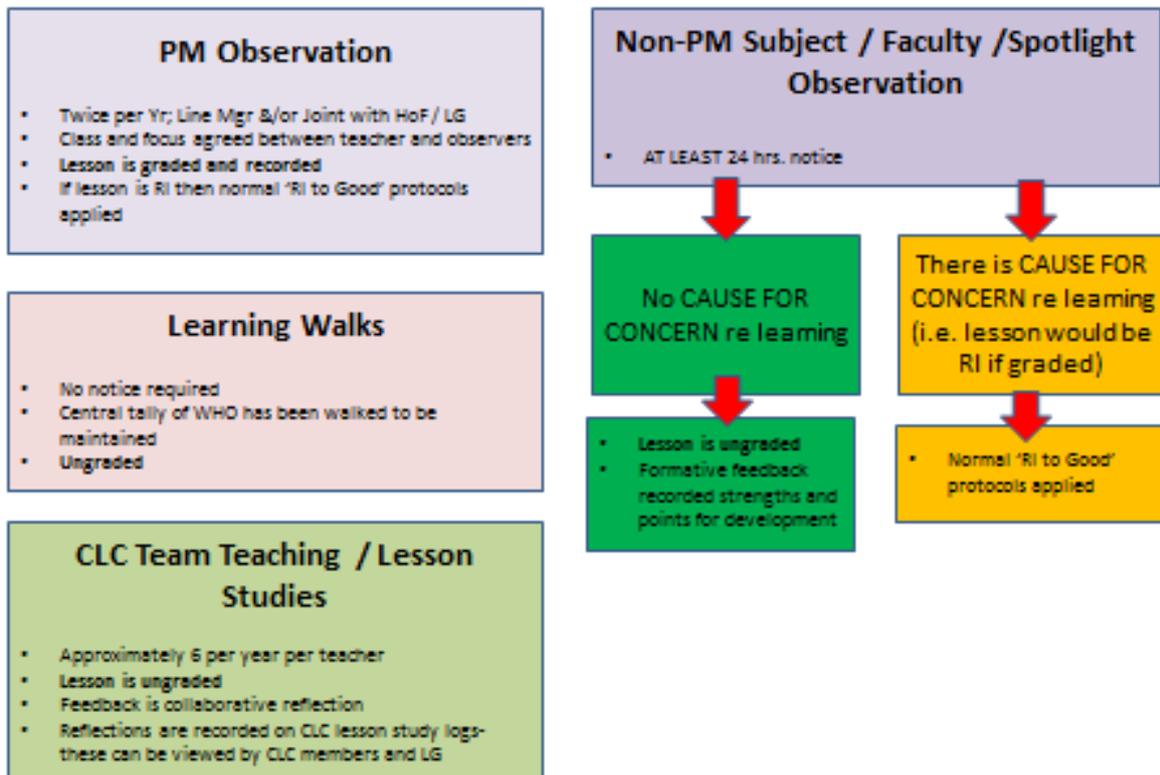
#### ***Policy regarding observations:***

Bohunt Education Trust Board believes that observation of classroom practice and other responsibilities is important for identifying areas for development and for gaining useful information that can inform school improvement more generally. All observation will be carried out in a supportive fashion.

In member schools teachers' performance will be regularly observed, but the amount and type of classroom observation will depend on the individual circumstances of the teacher and the overall needs of the member school. Classroom observation as a way of assessing teachers' performance in order to identify any particular strengths will be carried out by those with QTS and non-teaching Progress Leaders. In addition to formal observation, any teacher or Progress Leader may 'drop in' in order to check that high standards of professional

performance are established and maintained and/or learn from the teacher. The length and frequency of “drop in” observations will vary depending on the specific circumstances.

**The procedure for observations is:**



NB individual member schools will have their own version of this procedure according to context and need, some acronyms might also be different.

Review frequency: 2 years

Review date: March 2019

Last updated: March 2017