

Featherstone High School



Performance Management Policy

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Performance Management Policy

1. Roles

Performance management is a shared responsibility. The Governing Body has a strategic role in agreeing the school's performance of teachers at the school, and is regularly reviewed for monitoring the Performance Management process. The Headteacher is responsible for implementing the school's performance management policy and ensuring that performance management reviews take place.

Performance management involves both the team leader and the teacher working together to ensure that objectives are discussed and agreed; regular and objective feedback is given; adequate coaching, training and development is provided and that the performance review takes place. An external advisor provides advice to the Governing Body's representatives on the setting of performance objectives for the Head and will support them in reviewing performance at the end of the review cycle.

2. Responsibility for Reviews

Two governors carry out the Headteacher's performance management review. The Headteacher decides who shall act as a team leader for each teacher on the basis of responsibilities for learning in the school, a judgement about who has the best overview of the teachers work and the ability to provide support to staff in doing this. The Headteacher delegates responsibility to an appropriate team leader to ensure that each reviewer is responsible for a limited number of reviews. In some cases this is the Headteacher.

3. Timing of Reviews

Targets set in the Autumn Term before October 31st of each year

Results from each Key Stage, GCSE and other outcomes will be taken into account from June/August in considering pupil progress. These will be used to set new objectives and discuss future professional development activities. Using information from the school's Development Plan and the assessment data on pupils, a new individual plan and statement will be completed for each teacher.

Monitoring and Feedback

Once objectives have been agreed, progress will be monitored in a number of ways, e.g. presentations at departmental meetings, one to one discussions. Lesson observations will be included as part of the monitoring. Evidence will be agreed between reviewer and reviewee at the drawing up of the review statement in the Autumn term.

Formal Interim Reviews - Spring Term

Interim reviews normally take place in the Spring term to monitor progress towards performance criteria. This review process will inform our school management policies, and the School Development Plan for the following financial and academic year.

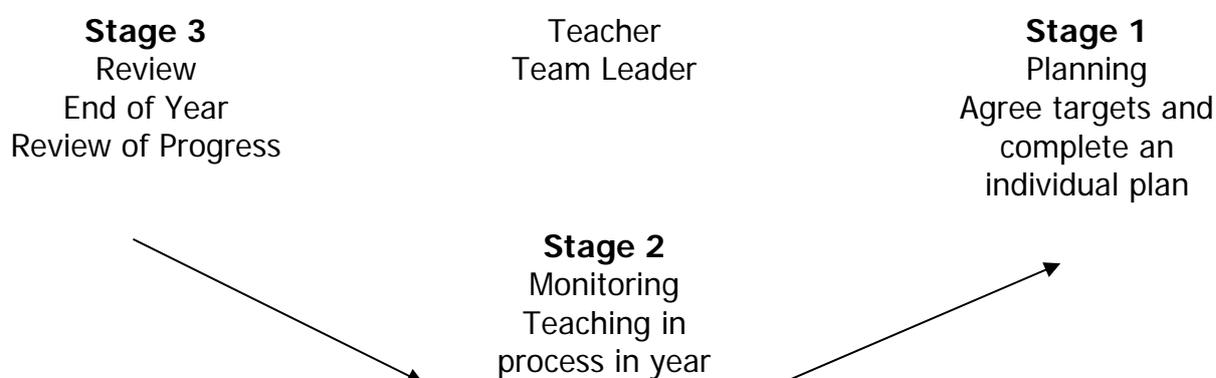
The process above continues annually.

4. Performance Management Cycle

The Governing Body is responsible for performance review and agreeing the performance management policy. The Headteacher is responsible for implementing the policy. The circumstances in which teachers work and the range of responsibilities they carry out vary considerably. Discussions should be set in the context of the professional duties set out in the School Teachers' Pay and Conditions document and the teacher's own work and job description.

Performance management is set in the context of the school's plans for development, against the background of the local education development plan (EDP), national and local initiatives on improving and any recent OFSTED report for the school.

Performance management is an on-going cycle, not an event, involving 3 stages; planning, monitoring performance and reviewing performance. The end of year review and stage 1 may happen at the same time.



Stage 1: Planning

Each teacher discusses and agrees objectives with their team leader and records these in an individual plan (targets should be challenging but realistic and take account of a teacher's job description and their existing skills and knowledge base).

The range of targets should match the nature of the job, including leadership or management areas as appropriate. Where someone has a wide range of managerial duties, targets might focus on specific areas of this work.

Teacher targets will cover pupil progress as well as ways of developing and improving teachers' professional practice. Leadership group staff and those with management allowances will have targets relating to their additional responsibilities.

Schools will use the outcomes of their last two performance reviews to assess whether a teacher meets the post-threshold standards. In order to support this process, all targets should relate to The Professional Standards for Teachers.

The head's targets will cover school leadership and management as well as pupil progress.

When discussing targets the following principles will be followed:

- The team leader should ensure that the teacher understands what his or her targets involve, is in a position to achieve them, knows what they need to do to achieve them and understands when and how they will be reviewed;
- Targets are written clearly and concisely and are measurable;
- Targets focus on issues/matters over which a teacher has direct influence/control and take into account fully the wider socio-economic, cultural and other external influences on pupils;
- Targets for each teacher should relate to the targets in the school development plan and any departmental or team plans as well as his/her own professional needs; and
- Targets should relate to the Professional Standards for Teachers.

The team leader should record the targets which will apply for the review period. These should be jointly agreed if possible. If there are any differences of opinion about the targets the teacher may appeal to the Governing Body representatives and the Headteacher. If the Headteacher and the Governing Body representatives are unable to agree targets, the governors appointed to review the performance of the Headteacher should set and record the targets. The Headteacher may add comments to the written record of targets.

Professional development opportunities are required to support agreed objectives, to develop strengths and address areas for development or professional growth. The planning statement of the individual will be used to record the action the reviewee will take to meet the agreed targets and the support that may be required from the school.

Stage 2: Monitoring Progress

The Teacher and team leader will keep progress under active review throughout the year using classroom observation and other relevant information, as agreed in the professional development review statement. They will discuss any supportive action needed and keep development plans up-to-date.

The team leader should consult the teacher before seeking to obtain information, written or oral, relevant to the teacher's performance from other people.

The Observation Protocol

Classroom observation is accepted good practice. It is not a requirement to observe Headteacher's with teaching responsibilities. In planning observation, the following principles will be followed:

- Successful observation requires preparation and training, and a clear understanding on the part of the teacher and team leader of its purpose. The observation of a teacher will only be carried out by a qualified teacher, who has experience and/or the training to observe and give feedback.
- The nature of the observation depends on its purpose and the areas of focus should be agreed before the lesson begins between the observer and the observed.
- It is important that the observer ensures that the lesson proceeds in as normal an atmosphere as possible;

- Full, constructive verbal and written feedback offers an opportunity to discuss what went well, what might be done better or differently next time. When giving feedback, the team leader should take into account the range of activities carried out by the teacher and the time spent on each activity as well as the focus agreed before the observation.
- Oral feedback will be given within 24 hours of the observation and written feedback up to 5 days after the lesson was observed.

Copies should be kept by the teacher, the team leader, the teacher development team and Assistant Headteacher i/c training and development.

Stage 3: Reviewing Performance

The annual review of the teacher's performance will use the recorded targets as a focus to discuss his/her achievements and identify any development needs. It will be combined with agreeing targets for the following performance management cycle (see stage 1).

The focus of the review is on how to raise performance and improve effectiveness to ensure good pupil progress. It will involve:

- Reviewing, discussing and confirming the teacher's essential tasks and objectives; (Copies of job descriptions will be available)
- Identifying areas for development and how they will be met;
- Recognising personal development needs and
- Agreeing new clear objectives in line with the school's Development Plan and completing an individual plan, which will include the actions needed to meet them for the year ahead.

The reviewer should evaluate the teacher's overall performance, including an assessment of the extent to which objectives have been met, and the teacher's contribution to the life of the school during the review period. It should take account of the stage the teacher is at in his or her career e.g. teacher with 2-3 years service, TLR, senior manager. Professional Standards should be used as guidance and benchmarks for assessing performance.

A Review Statement must be written and signed by both parties at the end of the meeting. A copy should be kept by the Reviewee and the Head Teacher.

All members of staff must observe the national deadline (October 31st) in submitting the Review Statement.

5. Links between Pay, Career Stages and Performance Management Induction

The final review meeting of the induction period can be used to agree objectives and professional development opportunities at the first stage of the teacher's subsequent performance management cycle

Information from the performance review statement can be used to inform aspects of the new pay structure from September 2007.

- Up to the Threshold – teachers can expect an annual increment if they are performing satisfactorily. Double increments for exceptional performance would need to be justified by review outcomes.

- Threshold – teachers who want to move to the upper pay spine will have to demonstrate through their performance reviews that they meet the Post Threshold Standards. The previous two years reviews will be considered.
- Performance pay points above the threshold and teachers in the leadership group – performance reviews will form part of the evidence which schools can use to make decisions about awarding performance pay points to eligible teachers.

6. Managing Weak Performance

Good management, with clear expectations and appropriate support, will go a long way towards identifying and handling weaknesses in performance.

The review meeting and review statement do not form part of any formal disciplinary or capability procedures. However, relevant information from review statements may be taken into account by those who have access to them in making decisions and in advising those responsible for taking decisions, or making recommendations about performance, pay, promotion, dismissal or disciplinary matters.

7. Access to Outcomes

There will only be two copies of the review statement – one held by the teacher and another held by the head on a central file, to which the team leader or governors responsible for making decisions regarding pay could request access. A copy of the Headteacher's review statement should go to the Chair of Governors

Information about performance reviews should be made available as listed below:

- The Headteacher should ensure that individual training and development needs are reflected in the School Development Plan and in the programme for professional development
- The Headteacher should ensure that training and development needs from the review statement are given to the person responsible for training and development at the school;
- The Headteacher should report annually to the governing body on performance management in the school, including the effectiveness of the performance management procedures in the school, and the training and development needs of teachers; and
- The Director of Education can request from the Chair of Governors a summary of the performance assessment section of the head's review statement

The Head should keep review statements for at least three years.

8. Complaints

This section explains the procedures for complaining about reviews

The Review

Within 10 days of receiving the review statement:

- Teachers can record their dissatisfaction with aspects of the review on the review statement. Where these cannot be resolved, with the team leader, they can

raise their concerns with the head. Where the head is the team leader, the teacher can raise the issue with the Chair of governors.

- Headteacher's can record their dissatisfaction with aspects of the review on the review statement. Where these cannot be resolved with the appointed governors, they can raise their concerns with the Chair of Governors. Where the Chair of Governors has been involved in the review process, the governing body should appoint one or more governors who have not participated in the head's review to act as review officer. No governor who is a teacher or staff member can be involved in performance review.
- The Review Officer (who could be the head, the Chair of Governors or the governors appointed by the governing body) will investigate the complaint and take account of comments within 10 working days of referral. S/he may decide that the review statement should remain unchanged or may add any observation of his/her own. The review officer may decide, with the agreement of the person responsible for carrying out the initial review, or in the head's case all the appointed governors, to amend the review statement; or declare that the review statement is void and order a new review or part of the review to be repeated. Where a new review is ordered new governors will be appointed to carry out the review or part review ordered, this should be conducted within a further 15 days.

9. Evaluation of the Policy

The Headteacher shall provide an annual report to the Governing Body on how effective the performance management procedures have been.

The school is committed to ensuring that individual teachers, teams and the school continues to improve, the Governing Body and the Headteacher will check that effective and challenging objectives are set, that all reviews are completed on time and the assessment of performance is consistently applied in the school.

As part of ongoing commitment the Governing Body and Headteacher will update and amend the documentation and the process as required, after consultation with all staff, to incorporate any major changes introduced either by the DfES or the school to ensure that the policy is up-to-date and effective within the school.

Annex B

Copies of all Standard Documents, which will be used – the individual plan, which includes the review statement and the classroom and the classroom observation form, can be found attached in the annexes.

Annex A

A summary of statutory requirements set out in the new Appraisal Regulations for September 2000

10. The Governing Body

- Must determine the procedures for the performance review of school teachers at a school.

It is responsible for:

- Ensuring that the performance of teachers is reviewed in accordance with the Regulations
- Appointing an accredited external advisor from an approved list.
- Deciding on the exact timing of the performance review cycle for the Headteacher
- Carrying out the performance review of the Headteacher. In so doing it appoints two or three Governors to carry out the performance review. Representatives should not include teachers or other members of staff at the school
- Appointing one or more review officers where a complaint is made by the Headteacher about his/her performance review and the Chair of Governors has been involved in that performance review

11. The Chair of Governors

- Is the review officer for complaints from the Headteacher where s/he has not been involved in the performance review, and for teachers where the Headteacher is the team leader

Must:

- Provide any review officer or new reviewer with a copy of the performance review statement and with the objectives relating to that statement.
- Pass the training and development section of the Headteacher's performance review statement to the person responsible for training and development in the school
- Provide a summary of the overall assessment of performance section on the Headteacher's review statement to the Director of Education, or an advisor specifically designated by the Chair of Education Officer, on request

12. The Governors Responsible for Reviewing the Performance of the Headteacher

Must:

- Seek advice from the appointed external advisor when setting objectives and reviewing the performance of the Headteacher
- Meet with the Headteacher and advisor at the start of the performance review cycle to plan and prepare for the performance review, and set and record Headteacher objectives relating to school leadership and management and pupil progress
- Meet with the Headteacher and advisor at the end of the performance review cycle to review the head's performance and identify achievements, including assessment of achievement against objectives, and to discuss and identify professional development needs/activities
- Write a performance review statement and give a copy to the Headteacher within 10 days of the review meeting and allow 10 days for the Headteacher to add written comments
- Provide the Headteacher and Chair of the Governing Body with a copy of the Headteacher's performance review statement

- On request, provide a copy of the Headteacher's statement to those governors who are responsible for making decisions in relation to promotion and pay, who should take account of this when making such decisions.

13. The Headteacher

Is responsible for:

- Appointing an appropriate team leader for each teacher, to carry out their performance review
- Deciding on the exact timing of the performance review cycle for teachers
- Providing a copy of a teacher's performance review statement to any review officer, including the objectives relevant to that statement.
- Ensuring that current planning statements are made available to a teacher's new team leader, if there is a change of reviewer

Must:

- Provide an annual report on performance management in the school to the Governing Body. It should contain a report on the operation of performance management in the school, the effectiveness of the school's performance management procedures and the training and development needs of the teachers.
- Provide whoever is responsible for planning and co-ordinating teachers' training and development in the school with a copy of the part of the performance review statement that relates to training and development
- Keep teachers' performance review statements secured on file until at least three years after the next performance review statement has been finalised
- Review complaints by teachers about their performance review statement, where they are not the team leader
- Pass a copy of the performance review statement to those teachers for whom they are team leader
- On request, provide a copy of the performance review statement to those governors who are responsible for taking decisions in relation to promotion and pay, who should take into account of this when making such decisions
- On request, pass a copy of the performance review statement to a teacher's team leader

14. The Headteacher as a Job Holder

Must:

- Meet with the reviewers and external adviser to agree targets at the start of the performance review cycle
- Meet with the appointed reviewers and external adviser to review performance at the end of the performance review cycle, including achievement against targets

May:

- Add written comments to the record of targets set by his/her reviewers (planning statement)
- Add written comments to the performance review statement or lodge an appeal against the performance review statement, within 10 days of receipt from the governors

15. The Team Leader

Must:

- Meet with each of the teachers for whom they will be the reviewer before, or at the end, or at the start of the performance review cycle to plan and prepare for performance review and discuss setting targets.
- Record targets in writing and allow the job holder to add written comments if they wish (planning statement). Teacher targets must include those relating to developing and improving teacher's professional practice and pupils' progress.
- Monitor performance against these targets throughout the year, and observe the teacher teaching in the classroom at least once during the review cycle.
- Consult the reviewee before obtaining oral or written information from others relating to the teacher's performance.
- Meet with the teacher at the end of the performance review cycle to review performance and identify professional development needs/activities.
- Write a performance review statement and give a copy to the reviewee within 10 days of the final performance review meeting, and allow 10 days for the job holder to add written comments.
- Pass the completed performance review statement to the Headteacher.

16. The Job Holder (School Teachers Who Are Not Headteacher's)

Must:

- Meet with their team leader before or at the start of the performance review cycle to discuss setting targets.
- Either agree objectives with team leader or add written comments to the targets recorded by the team leader.
- Meet with their team leader at the end of the performance review cycle to review performance and identify achievements, including assessment of achievement against targets, and to discuss and identify professional development needs/activities.
- May add comments to the performance reviews statement or complain about their performance review statement within 10 days of receipt from the team leader.

17. Performance Review Cycle

The length of the performance review cycle shall normally be one year. In the first year of operation only, the performance review cycle for teachers may be as short as 9 months, or extended up to a maximum of 18 months. Where a teacher changes jobs within a school, the performance review cycle may be less than a year as the teacher should keep within the same school cycle. Where a teacher moves to a new school, the performance review cycle may be less than one year as the teacher will move into a new school cycle.

18. Complaints

Where a complaint is made about the performance review statement, the review officer is responsible for reviewing the complaint. This should be carried out within 10 working days of receiving the complaint. The review officer may order the performance review statement to stand with or without observations, may amend the statement, or order that parts of the review or whole review be repeated. Where a new review or part review is ordered, this should be carried out within 15 working days.