Performance Management Policy

Policy title:	Performance Management Policy
Function:	For information and guidance about performance management procedures for staff at The Blue Coat School. This document forms part of the portfolio of policies designed to inform staff.
Status:	Approved
Statutory guidance:	Staffing and employment advice for schools (October 2021) Teachers' appraisal and capability model policy (March 2019) Teachers' standards (December 2021)
Audience:	Staff, Leaders, Trustees
Ownership:	Finance and Resource Committee/Headteacher
Last reviewed:	July 2022
Reviewed by:	Finance and Resource Committee
Next review:	Every year – June 2023

Note:
The provisions contained within this policy for support staff are under review and will be subject to consultation with relevant colleagues.

Contents

Aims and objectives

At the Blue Coat School our vision is simple. All that we do is focused on developing exceptionally well-rounded individuals with the skills to thrive and positively contribute in a rapidly changing society.

This in underpinned by our unrelenting focus on:

Inspiring excellence

Excellence is not something that is simply achieved. It something that we always strive for so that we can continually create opportunity and enhance the life chances of talented young people from broad and diverse backgrounds. The best is not, however, always the easiest. Our staff and learners will be resilient, and able to overcome barriers and challenges to ensure that potential is unlocked.

Shaping character
Our learners leave us not just knowing how to do things, but how to do things in the right way for the right reasons. That is why humility and integrity are the key pillars of our community, and the basis for how we treat one another. They ensure we have a culture where individuals are treated with care and compassionate respectfulness.

Forging futures
Every member of our community will leave us embracing their strengths and with ambition and aspiration as to how they can contribute positively to the modern world they are entering. Our students will become the leaders of tomorrow.

By extension, our values, approach and ethos are embodied in, and implemented through, our policies and procedures. They are the framework to support all that we do and achieve.

The purpose of this policy is to:

1   To ensure a clear and consistent framework for the assessment of staff performance.

2   To promote a culture of supportive professional development for all staff within the context of the school's plan for improving educational provision and performance and the standards expected.

3   To ensure that all staff are given the opportunity to develop the skills they need to carry out their duties to a high standard.

4   Ensure that staff are able to continue to improve their professional practice and to develop in their roles.

Roles and responsibilities

5   The Board of Trustees will ensure this policy:
- conforms with statutory guidance and is reviewed regularly
- is applied fairly and consistently in support of all staff.

6   The Headteacher will ensure this policy is communicated to all members of staff and applied consistently by all line managers.

7   Line managers will ensure they implement this policy with fairness and consistency.

8   Employees of the school will ensure that they have read and understand all aspects of this policy.

Procedures and practices

Performance management cycle

9   The performance management cycle will run annually from 1 October to 30 September for all staff.

10   Staff who are employed on fixed term contracts of less than one year will engage with performance management in accordance with the principles of this policy. The length of the period for assessment will be determined by the Headteacher in line with the duration of their contract.

Line managers

11   The Headteacher's performance management will be undertaken by the Board of Trustees, supported by a suitably skilled and/or experienced external adviser who has been appointed by the Board for that purpose.

12   The Headteacher will decide who will manage the performance of other staff.

13   Performance management records are confidential. They may only be accessed by a member of staff's line manager or senior leaders who have oversight of that area.

Agreeing objectives

14   The Headteacher's objectives will be set by the Board of Trustees after consultation with an external adviser.

15   Before the start of each performance management cycle, staff will be informed of the standards against which their performance in that cycle will be assessed. Teachers and support staff will be assessed against different criteria matched to their respective roles.

16   Objectives for each member of staff will be set before or as soon as practicable after, the start of each cycle.

17   The objectives set for staff will contribute to plans for improving the school's educational provision and performance and improving the education and attainment of pupils at that school. The objectives set for staff will also align to the overall values and aims of the school.

18   All staff including those who work part time will have 3 objectives. Objectives for part time staff should reasonably reflect the number of hours they are available for work.

19   Objectives will be rigorous, challenging, achievable, time-bound, fair and equitable and will take into account roles, responsibilities and experience. Members of staff will take responsibility for proposing suitable objectives so that they can engage in productive discussions with their line managers and agree objectives together. If a member of staff and line manager cannot agree on suitable objectives, an independent member of the senior leadership team will be asked to mediate a mutually agreeable outcome.

20   Objectives should not be expected to cover the full range of the member of staff's roles and responsibilities but will be guided by current school and individual priorities. At the beginning of each cycle, the headteacher may specify the foci of objectives.

21   Objectives may be revised if circumstances change during the cycle.

Monitoring performance

22   Line managers will use a range of opportunities to gather evidence to determine performance and identify strengths and areas for development. This could include the use of Annex H.

23   Staff (including the headteacher) who have responsibilities outside the classroom should expect to have their performance evidenced and recorded.

24   The school will set out clear approaches to guide managers in the monitoring and development of:
   ▪ teachers (Annex A)
   ▪ support staff (Annex B)
   ▪ leaders (Annex C).

25   Line managers will be guided by activities/sources of evidence that could be used during the performance management cycle (Annex D).

26   Staff will receive verbal and written feedback after any activity that is used to monitor and develop performance. It is expected that as far as possible, feedback should be shared within 5 working days.

27   The school will ensure there are efficient procedures in place to manage the collation of performance management information. In doing so, the school will be guided by its commitment to streamlining processes, minimising bureaucracy and reducing staff workload.

28   Information gathered during monitoring will be used to inform school self-evaluation and school improvement strategies.

29   Line managers will ensure that performance management activities are supportive and used to inform continuing professional development. The school will promote a culture in which all staff take responsibility for improving their practices through appropriate professional development.

30   Regular review meetings between staff and their line managers will take place throughout the cycle. At least one of these meetings will be used to formally record the performance of staff at

the mid-point of the cycle. Review meetings will provide an opportunity for professional dialogue between the line managers and staff to discuss:

- actions taken
- impact of actions
- next steps
- barriers to success
- support

Annual assessment of performance

31   Line managers will meet with staff before the end of the performance management cycle to formally review and assess their performance. In assessing the performance of the Headteacher, the Board of Trustees will consult an external adviser.

32   The annual assessment will be guided by the principle of establishing the presence of strong performance rather than the absence of weak performance. It is the responsibility of line managers to provide evidence using the principles of supportive monitoring outlined in this policy.

33   Annual assessments will be a two-way, productive and supportive discourse in which the main strengths and areas for improvement of staff will be recognised.

34   The assessment process will take into account the overall performance of staff by considering:

- progress towards achieving their objectives
- information arising out of other opportunities to monitor their performance
- how effectively the member of staff undertakes the duties of their job description
- an evaluation of performance against relevant indicators
- the impact of other factors on performance.
- the impact of other factors on the implementation of this policy.

35   The annual assessment will be documented (Annex I) and include:
- an evaluative assessment of the member of staff's performance in meeting their objectives
- an evaluative assessment of the member of staff's performance in their wider role
- an overall judgement about the performance of the member of staff which indicates whether the member of staff:
  - meets the expectations of their role
  - does not meet the expectations of their role
- a supporting statement which outlines the rationale for the above judgement
- suggested further development points
- a recommendation as to whether or not member of staff should be considered for pay progression (where relevant).

Monitoring, review and evaluation

36   The Board of Trustees will ensure that the procedures and practices of this policy are monitored, reviewed and evaluated.

37   The Headteacher will ensure that
- the Board of Trustees is presented with the necessary information to rigorously evaluate the effectiveness of performance management processes
- objectives, mid-year review, end of cycle review and annual assessments are moderated and quality assured to ensure appropriateness and consistency.

38   The school will regularly review the outcomes of performance management cycles to ensure that all members of staff have equal access to high quality support, development and challenge.

39   The school will always review the application and effectiveness of this policy where weak performance has instigated formal capability procedures.

Annex A: Monitoring and developing teaching practice

Purpose

The monitoring and evaluation of teaching practice will be undertaken to:

- assess and improve teachers' performance against teachers' standards
- evaluate and support teachers' progress towards performance management objectives
- identify any particular strengths and areas for development
- gather useful information which can inform school improvement more generally

Approach

All monitoring and evaluation of teaching practice will be:

- applicable to each member of staff with teaching responsibilities
- undertaken by a senior/middle leader with qualified teacher status
- carried out with a specific developmental focus
- advance notice as per schedule
- recorded on the relevant forms
- shared in writing with the teacher if requested
- be used to provide supportive and developmental verbal feedback

Extent

In a 12 month cycle, the monitoring and evaluation of teaching practice will include:

- evidence gathered through the Subject Development Framework including learning visits (Annex E)
- the monitoring and evaluation of students' work (Annex F)
- the monitoring and evaluation of relevant student outcomes

Annex B: Monitoring and developing support staff

<mark>**Annex B - This section is under review**</mark>

Purpose

The monitoring and evaluation of support staff will:

- Assess staff performance against the job description
- Evaluate and support progress towards performance management objectives
- Identify particular strengths and areas for development
- Gather other information to support school improvement more generally

Approach

All monitoring and evaluation of support staff will be:

- Undertaken by a support staff team leader or other nominated senior
- Carried out with a specific development focus
- Agreed in advance
- Recorded on the relevant form
- Shared in writing with the support staff member
- Be used to provide supporting and developmental verbal feedback

Extent

In a 12 month cycle, the monitoring and evaluation of support staff will include:

- Evaluations against relevant performance outcomes (Annex H)
- Reviews of the quality of work undertaken (Annex H)

Annex C: Monitoring and developing team leaders

Purpose

The monitoring and evaluation of team leaders will:

- assess staff performance against other responsibilities defined on their job description
- evaluate and support leaders' progress towards performance management objectives
- identify particular strengths and areas for development
- gather other information to support school improvement

Approaches

All monitoring and evaluation of team leaders will be:

- applicable to each member of staff that has line management responsibility
- undertaken by a suitably trained senior/middle leader
- developmental
- agreed in advance
- recorded on the relevant form
- shared in writing with the staff observed
- be used to provide supportive and developmental verbal feedback

Extent

In a 12-month cycle, the monitoring and evaluation of team leaders will include evidence from:

- the identification of strengths and areas for improvement through bi-weekly meetings (Annex G)
- leadership of the team and team meetings (Annex H)
- support, challenge and development of individual team members (Annex H)
- leadership of professional development of team members
- the review of relevant area outcomes (Annex H)

Annex D: Range of evidence for performance management

The following table sets out the activities/sources of evidence that could be used in the performance management cycle

Activity	Role			
	Class teacher	Support staff	Team leader (In addition)	Senior leader (In addition)
Learning visits to classrooms	✓			
Learning visits to form time	✓			
Review of students work	✓			
Review of relevant individual outcomes	✓	✓		
Review of quality of work		✓		
Bi-weekly 1-2-1 meetings			✓	✓
Evidence from team meetings			✓	✓
Leadership of professional development of team members			✓	✓
Review of improvement documentation			✓	✓
Review of relevant area outcomes			✓	✓

Annex E: Learning visit form

This pro forma is to be completed during the learning visit window. The tick box should be completed as part of a learning visit and a comment can be made about any best practice that has been seen. N/A should be used if the criteria does not apply to the lesson and a comment made to explain this. A comment can also be made by HOD's/SCO's if there is a department T&L focus. Books can be used to evidence the below.

Date		Visitor		Teacher	
Subject		Class		Period	

	Teaching and Learning whole school foci and priorities	Developed	Developing	Comment: *Only required to explain n/a. May be used to record best practice, queries or to acknowledge where evidence of this can be found if not during the lesson.*
1.	Does the lesson/student work reflect the sequence of lessons outlined in the curriculum map?			
2.	Is there evidence of metacognitive strategies being used by the teacher e.g modelling, scaffolding, self-reflection			
3.	Is the lesson planned with appropriate challenge to promote academic excellence?			
4.	Is there evidence that the teacher uses support strategies for students who are SEND, PP and/or vulnerable?			
5.	Is there evidence of the use of key terminology during the lesson?			
6.	Is higher order questioning utilised to support whole class feedback and to probe and challenge student understanding?			
7.	Is there strong use of subject and curriculum knowledge by the teacher?			
8.	Is there evidence of that students are developing and deepening their knowledge and skills over time?			
9.	Is there evidence of teacher feedback (verbal and written) that allows for misconceptions to be addressed?			
10.	Are students provided with opportunities to learn about themselves and others? (Cultural Capital/CIAG etc)			
11.	Is the learning environment purposeful and engaging and that the school behaviour policy is being followed?			
12.	Is there evidence of assessment taking place?			

Comment on department T&L focus (if applicable).	
Any evidence of whole school best practice which could support other colleagues	

Annex F: Book look form

This pro forma is to be completed during the book look window. Evidence can be taken from a range of places eg books/folders/assessments. The tick box should be completed and N/A should only be used if the criteria does not apply to the subject, please write an explanation. Each staff member should have work looked at in the cycle. At least three students' books should be looked at with at least one of them being SEND/PP/Vulnerable.

Date		Visitor		Teacher	
Subject		Year Group		Students books checked- (Initials and Form)	

	Teaching and Learning whole school foci and priorities	Developed	Developing	Comment: *Only required to explain n/a. May be used to record best practice, queries or to acknowledge where evidence of this can be found if not available.*
1.	Does student work reflect the sequence of lessons outlined in the curriculum map?			
2.	Is there evidence of activities that are challenging and rigorous that promote academic excellence?			
3.	Is there evidence of knowledge retrieval activities taking place?			
4.	Are there opportunities for students to develop their understanding of themselves and others? (Cultural capital)			
5.	Is there evidence that knowledge is organised in a way that allows students to build secure schema?			
6.	Is there evidence of metacognition and self-regulation activities taking place?			
7.	Is there evidence that assessments have been completed and marked?			
8.	Is there evidence of high-quality teacher marking and feedback?			
9.	Do students get the opportunity to respond to teacher written feedback and make improvements (DIRT)?			
10.	Is there evidence of self and peer assessment?			
11.	Is there evidence of opportunities for students to read and develop their vocabulary?			
12.	Is there evidence that SEND/Vulnerable/PP progress in line with others and access the full curriculum?			

Comment on department T&L focus (if applicable).	
Any evidence of best practice which could support other colleagues (if applicable).	

Annex G: Note of discussion form

Between:		And:	
On:		At:	
Others present:			

Focus of discussion:

Taking into account school improvement priorities, upcoming events, recent meetings, previous action points and other suggested points

Summary of discussion points:

Optional

Next steps:		
By	Action	Deadline

Optional

Evaluation:	
Strengths	Areas for consideration

Annex H: Additional evidence to support determination of performance (optional)

By:		For:	
On:		At:	
Activity:			

Agreed areas of focus

Summary of observed points:

Evaluation:	
Strengths	Areas for consideration

Annex I: Annual assessment summary

This form should be used by line managers when completing end of cycle annual assessments for all staff.

PM cycle:		Date:	
Staff:		Job title:	
Line manager:		Job title:	

Supporting evidence	I have completed and submitted the following information to Sims: ☐ objectives agreed at start of cycle ☐ monitoring and evaluation of this role (See annex D and footnote*) ☐ mid-year overview statement ☐ end of cycle overview statement

Summary	(Insert a brief statement that takes account of the above evidence, performance against relevant indicators, general performance against the requirements of this role and the acquisition of skills and expertise)
Overall judgement	Taking into account the evidence summarised above, I am of the view that the performance of this member of staff ☐ meets the expectations of their role ☐ does not meet the expectations of their role
Supporting statement	(Insert a brief statement supporting your judgement)
Further development	1) (Insert suggested areas for development)
	2) (Insert suggested areas for development)
	3) (Insert suggested areas for development)

Signed: (Member of staff)		Date:	
Signed: (Line manager)		Date:	

Senior leader review	Having reviewed the evidence summarised in this statement, (Tick✓ or Cross✗ one or both): ☐ I support the line manager's overall judgement about the performance of this member of staff ☐ I recommend that this member of staff is eligible for and should be considered for pay progression		
Supporting statement	(Insert reasons here)		
Signed: (Senior leader)		Date:	
Signed: (Headteacher)		Date:	

*Note: The number of learning visits used as evidence for appraisal purposes is limited to three.