



Policy

Policy title:	Staff 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 2018) Teachers' appraisal and capability model policy (March 2019) Teachers' standards (June 2013)
Audience:	Staff, Leaders, Governors
Ownership:	Governing body/Headteacher
Last reviewed:	May 2019
Reviewed by:	Governing body
Next review:	Every year – May 2020

Contents

Aims and objectives	3
Roles and responsibilities	3
Procedures and practices	3
Performance management cycle	3
Line managers	3
Agreeing objectives	4
Monitoring performance	4
Annual assessment of performance	5
Monitoring, review and evaluation	6
Annex	7
Annex A: Monitoring and developing teaching practice	7
Annex B: Monitoring and developing support staff	8
Annex C: Monitoring and developing team leaders	9
Annex D: Minimum expectations of performance management	10
Annex E: Monitoring and evaluation of teaching form	11
Annex F: Monitoring and evaluation of students' work form	14
Annex G: Note of discussion form	15
Annex H: Record of quality assurance form	17
Annex I: Annual assessment summary	19

Aims and objectives

- 1 To ensure a clear and consistent framework for the assessment of the performance of all staff.
- 2 To promote a culture of supportive professional development for all staff through a rigorous cycle of target setting, monitoring and review.
- 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 To ensure that there is a clear process in place to manage the performance of staff.

Roles and responsibilities

- 5 The governing body 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 Governing Body, supported by a suitably skilled and/or experienced external adviser who has been appointed by the Governing Body 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 Governing Body 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.
- 18 All staff including those who work part time will have 3 objectives. Objectives for part time 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 observe the performance and identify strengths and areas for development.
- 23 Staff (including the headteacher) who have responsibilities outside the classroom should expect to have all aspects of their performance observed and recorded.
- 24 The school will set out clear approaches to guide line managers in the monitoring and development of:
 - teachers (Annex A)
 - support staff (Annex B)
 - leaders (Annex C).
- 25 Line managers will be guided by minimum expectations of activities that must be undertaken

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 Governing Body 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.

- 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:
 - exceeds the expectations of their role
 - meets expectation the expectations of their
 - 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 governing body will ensure that the procedures and practices of this policy are monitored, reviewed and evaluated.
- 37 The headteacher will ensure that
- the governing body 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
- agreed in advance
- recorded on the relevant forms
- shared in writing with the teacher observed
- be used to provide supportive and developmental verbal feedback

Extent

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

- 2 separate visits to lessons (Annex E)
- 1 visit to form time (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

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:

- the identification of strengths and areas for improvement through bi-weekly meetings (Annex G)
- the observation of the leadership of team meetings (Annex H)
- the observation of support, challenge and development of individual team members (Annex H)
- the scrutiny of improvement documentation: Area improvement plans, Area self-evaluation, Area performance management information (Annex H)
- the review of relevant area outcomes (Annex H)

Annex D: Minimum expectations of performance management

The following table sets out the minimum expectations of activities that must be completed during the performance management cycle:

Activity	Role			
	Class teacher	Support staff	Team leader (In addition)	Senior leader (In addition)
2 visits to lessons	✓			
1 visit to form time	✓			
Scrutiny of students work	✓			
Review of relevant individual outcomes	✓	✓		
Review of quality of work		✓		
Bi-weekly 1-2-1 meetings			✓	✓
Observation of team meetings			✓	✓
Observation of support and challenge of team			✓	✓
Scrutiny of improvement documentation			✓	✓
Review of relevant area outcomes			✓	✓

Annex E: Monitoring and evaluation of teaching form

Reviewee:	Reviewer:
Date:	Activity:
Year Group:	Subject:

Evidence of teaching	Impact on learning

Evidence of teaching (Continued)	Impact on learning (Continued)

1. Set high expectations which inspire, motivate and challenge students	
Strengths	Areas for improvement
2. Promote good progress and outcomes by students	
Strengths	Areas for improvement
3. Demonstrate and make good use of good subject and curriculum knowledge	
Strengths	Areas for improvement
4. Plan and teach well-structured learning	
Strengths	Areas for improvement
5. Adapt learning to respond to the strengths and needs of the students	
Strengths	Areas for improvement
6. Make accurate and productive use of assessment	
Strengths	Areas for improvement
7. Manage behaviour effectively to ensure a good and safe learning environment	
Strengths	Areas for improvement
8. Fulfil wider professional responsibilities	
Strengths	Areas for improvement

Annex F: Monitoring and evaluation of students' work form

Reviewer:		Reviewee:	
Date:		Activity:	
Year Group:		Subject:	
Areas of Work Scrutiny			
Main Issues from Subject Self-Review or AIP			
Standard of Work (Pride, Effort, Presentation, Organisation, Completion, Quality, Volume, Appropriate)			
Standard of Writing (SPaG, Sentence Structure, Extended Writing, Attitudes to learning over time)			
Standard of Mathematics (Calculations, Units, Tables, Graphs, Applications)			
Standard of Learning (Depth of Knowledge, Fluency, Understanding, Applications, Accuracy, Independence, Quality)			
Impact of Feedback (Frequency, Type, Quality, Accuracy, SPaG, Misconceptions Challenge, Opportunities to Improve)			
Subject Self-Review			
Strengths:		Areas for Development:	

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:

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Agreed actions:		
By	Action	Deadline

Evaluation:	
Strengths	Areas for improvement

Annex H: Record of quality assurance form

By:		For:	
On:		At:	
Activity:			

Focus of quality assurance:

Taking into account previous quality assurance, previous notes of discussion, school improvement plans and performance management targets.

Summary of observed points:

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Evaluation:	
Strengths	Areas for improvement

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	<p>I have completed and submitted the following information to Bluesky:</p> <ul style="list-style-type: none"> <input type="checkbox"/> objectives agreed at start of cycle <input type="checkbox"/> required monitoring and evaluation of this role (See annex D) <input type="checkbox"/> mid-year overview statement <input type="checkbox"/> end of cycle overview statement
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Summary	(Insert a brief statement that takes account of the above evidence, performance against relevant indicators, general performance against the requirements of this role, punctuality, attendance, meeting of deadlines and conduct)
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Overall judgement	<p>Taking into account the evidence summarised above, I am of the view that the performance of this member of staff:</p> <ul style="list-style-type: none"> <input type="checkbox"/> exceeds the expectations of their role <input type="checkbox"/> meets the expectations of their role <input type="checkbox"/> does not meet the expectations of their role
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Supporting statement	(Insert a brief statement supporting your judgement)
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Further development	1) (Insert suggested areas for development)
	2) (Insert suggested areas for development)
	3) (Insert suggested areas for development)

Pay progression (If eligible)	<p>On the balance of the evidence summarised in this statement:</p> <ul style="list-style-type: none"> <input type="checkbox"/> I recommend this member of staff is considered for pay progression <input type="checkbox"/> I do not recommend this member of staff is considered for pay progression
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Signed: (Member of staff)		Date:	
Signed: (Line manager)		Date:	

Senior leader review	Having reviewed the evidence summarised in this statement, (Tick or Cross both): <input type="checkbox"/> I support the line managers overall judgement about the performance of this member of staff <input type="checkbox"/> I support the line managers recommendation 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:	