



Bungay High School...

## Performance Management of Teaching Staff



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# Opportunity and Excellence for All





# Performance Management of Teaching Staff

## **Application of the Policy**

The policy applies to the headteacher and to all teachers employed by the school except teachers on contracts of less than one term, those undergoing induction (*i.e. NQTs*) 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. 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.

## **Links to School Improvement, School Self Evaluation and School Development Planning**

To comply with the requirement to show how the arrangements for performance management link with those for school improvement, school self-evaluation and school development planning and to minimise workload and bureaucracy the performance management process will be the main source of information as appropriate for school self-evaluation and the wider school improvement process.

Similarly, the school improvement and development plan and the school's self evaluation form are key documents for the performance management process.

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.

To ensure this the following provisions are made in relation to moderation, quality assurance and objective setting.

## **Quality assurance**

The headteacher, where he has delegated the reviewer's duties to another teacher, may review the contents of the plan recorded in the statement.



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The headteacher 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 may review the contents of the headteacher's plan recorded in the headteacher's statement. In the first year of the operation of the revised regulations in relation to the headteacher, the governing body will nominate two governors who will not be involved in the headteacher's performance management or any appeal regarding the head teacher's performance management to ensure that the head teacher's planning statement is consistent with the school's improvement priorities and complies with the school's performance management policy and the Regulations. The Governing Body will review the quality assurance processes when the performance policy is reviewed.

## **Objective Setting**

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 desirability of the reviewee being able to achieve a satisfactory balance between the time required to discharge his professional duties and the time required to pursue his personal interests outside work, consistent with the school's strategy for facilitating a reasonable work/life balance. 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 students 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 this school, teachers and the headteacher will have no more than four objectives per cycle of which two may reflect a whole school/team objective.

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.



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## **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.

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. Where a reviewee wishes to appeal on the basis of more than one entry this would constitute one appeal hearing. Details of the appeals process are covered in the school's pay policy.

## **Confidentiality**

The whole performance management process and the statements generated under it, in particular, will be treated with strict confidentiality at all times. The reviewer will forward a copy of the reviewee's statement to the Deputy Head. The headteacher will also have access to this copy. The reviewee's line manager or, where s/he has more than one, each of her/his line managers will also be provided with access to the reviewee's statement,

## **Training and Support**

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.

An overview of the training and development needs of teachers in general will form a part of the head teacher's annual report to the governing body about the operation of the performance management in the school.

With regard to the provision of CPD in the case of competing demands on the school budget, a decision on relative priority will be taken with regard to the extent to which: (a) the CPD identified is essential for a reviewee to meet their objectives; and (b) the extent to which the training and support will help the school to achieve its priorities. The school's priorities will have precedence. Teachers should not be held accountable for failing to make good progress



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towards meeting their performance criteria where the support recorded in the planning statement has not been provided.

## **Appointment of Reviewers for the Headteacher**

- **Appointment of Governors**

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

- **Appointment of School Improvement Partner or External Adviser**

The local authority has appointed a School Improvement Partner for the school, who will provide the Governing Body with advice and support in relation to the management and review of the performance of the head teacher.

## **Appointment of Reviewers for Teachers**

The head teacher will be the reviewer for those teachers he directly line manages and will delegate the role of reviewer, in its entirety, to the relevant line managers for some or all other teachers. The maximum number of reviews that any line manager will be expected to undertake per cycle is five. Where a teacher has more than one line manager the head teacher will determine which line manager will be best placed to manage and review the teacher's performance.

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.

All line managers to whom the headteacher has delegated the role of reviewer will receive appropriate support for that role.

## **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<sup>st</sup> October and for head teachers by 31<sup>st</sup> December.

The performance management cycle in this school, therefore, will run from October to October for teachers. A Professional Development Day in the Autumn term will be devoted to performance management review/planning meetings.



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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 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.

## **Retention of Statements**

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

## **Monitoring and Evaluation**

The governing body will monitor the operation and outcomes of performance management arrangements. The head teacher will provide the governing body with a written report on the operation of the school's performance management policy annually. The report will not contain any information which would enable any individual to be identified. The report will include:

- the operation of the performance management policy;
- the effectiveness of the school's performance management procedures;
- teachers' training and development needs.

The Governing Body is committed to ensuring that the performance management process is fair and non-discriminatory and the following monitoring data should be included in the headteacher's report because they represent the possible grounds for unlawful discrimination:

- Race
- Sex
- Sexual orientation
- Disability
- Religion and belief
- Age
- Part-time contracts
- Trade union membership.

The head teacher will also report on whether there have been any appeals or representations on an individual or collective basis on the grounds of alleged discrimination under any of the categories above.



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## **Review of the Policy**

The Governing Body will review the performance management policy every school year at its Summer Term meeting. The Governing Body will take account of the headteacher's report in its review of the performance management policy. The policy will be revised as required to introduce any changes in regulation and statutory guidance to ensure that it is always up to date.

The Governing Body will seek to agree any revisions to the policy with the recognised trade unions having regard to the results of the consultation with all teachers. To ensure teachers are fully conversant with the performance management arrangements, all new teachers who join the school will be briefed on them as part of their introduction to the school.

## **Access to Documentation**

Copies of the school improvement and development plan and SEF are published on the school's intranet and/or can be obtained from the Headteacher's P.A..

## **Classroom Observation Protocol**

All classroom observation will be undertaken in accordance with the performance management regulations, the associated guidance published by the Rewards and Incentives Group and the classroom observation protocol that is appended to this policy in Annex 1.

## **Other Admissable Evidence**

The established practice in this school is to conduct regular student evaluations of programmes of work. These may be referred to in the performance management process where appropriate.

Reviewed April 2010



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## Annex 1- Classroom Observation Protocol

The Governing Body is committed to ensuring that classroom observation for the purposes of performance management is developmental and supportive and that those involved in the process will:

- carry out the role with professionalism, integrity and courtesy;
- evaluate objectively;
- report accurately and fairly; and
- respect the confidentiality of the information gained.

The total period for classroom observation arranged for any teacher will not exceed three hours per cycle having regard to the individual circumstances of the teacher. There is no requirement to use all of the three hours. The amount of observation for each teacher should reflect and be proportionate to needs.

The arrangements for classroom observation will be included in the plan in the planning and review statement and will include the amount of observation, specify its primary purpose, any particular aspects of the teacher's performance which will be assessed, the duration of the observation, when during the performance management cycle the observation will take place and who will conduct the observation.

Where evidence emerges about the reviewee's teaching performance which gives rise to concern during the cycle, classroom observations may be arranged in addition to those recorded at the beginning of the cycle subject to a revision meeting being held in accordance with the Regulations.

Information gathered during the observation will be used, as appropriate, for a variety of purposes including to inform school self-evaluation and school improvement strategies in accordance with the school's commitment to streamlining data collection and minimising bureaucracy and workload burdens on staff.

In keeping with the commitment to be supportive and developmental, those being observed will be notified three working days in advance.

Classroom observations will only be undertaken by persons with QTS. In addition, classroom observation will only undertaken by those who have had adequate preparation and the appropriate professional skills to undertake observation and to provide constructive oral and written feedback and support, in the context of professional dialogue between colleagues.



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Oral feedback will be given as soon as possible after the observation and usually no later than the end of the following working day and in a suitable, private environment.

Written feedback will be provided within five working days of the observation taking place. If issues emerged from an observation that were not part of the focus of the observation as recorded in the planning and review statement, these should also be covered in the written feedback and the appropriate action taken in accordance with the regulations and guidance.

The written record of feedback also includes the date on which the observation took place, the lesson observed and the length of the observation. The teacher has the right to append written comments on the feedback document. No written notes in addition to the written feedback will be kept.

The headteacher will seek to discharge his/her responsibility for monitoring the quality of teaching and learning for the purposes of performance management primarily through the planned classroom observations.

'Drop-ins' will only be a necessary part of the performance management process where evidence arises which merits the revision of the performance management planning statement, in accordance with the provisions of the regulations.



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**CONFIDENTIAL**

**PLANNING AND REVIEW STATEMENT**

Reviewee's Name:

Reviewer's Name:

Date of Meeting:

Assessment of performance for the performance management cycle just ended and recommendation for pay progression (where reviewee is eligible)

Objectives:	Target met (✓)	Target not met (✓)	Progress Made (✓)
1.			
2.			



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3.			
4.			

Objectives for next cycle including any relevant whole school/year/team/faculty objectives:  
(3 or 4)

1.
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2.

3.

4.

Extent, pattern and focus of planned classroom observation:

Other evidence:



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Resources to support the objectives:
Timescales for completion:
Training and Development needs:
Any action to be taken in relation to Training and Development:

Reviewer signature .....

Reviewee signature .....

Reviewee comments:

A copy of this form must be passed to the reviewee within five working days of the meeting.