



# WALTON HIGH SCHOOL

*Proud to be part of Walton Multi Academy Trust*



## PERFORMANCE MANAGEMENT POLICY

Reviewed by Governors:	June 2023
To be reviewed:	June 2024
Leadership link person:	Dr J Rowley

*Walton Multi Academy Trust refers to all schools within the Trust.  
When referring to Trust Boards, this includes Local Governor Boards, and the term  
'Governor' includes all Trustees or Local Board Governors.*

## **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 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 headteacher and for supporting their development needs within in the context of the school's improvement plan and their own professional needs. Where teachers are eligible for pay progression, the assessment of overall performance will be the basis on which the recommendation is made.

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 and the Education (School Teacher (Performance Management) (England) Regulations 2006.

## **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 source of information as appropriate for school self-evaluation and the wider school improvement process.

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.

## **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 they have delegated the reviewer's duties to another teacher, may review the contents of the plan recorded in the statement. In the first year of operation of the revised regulations 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 the Chair of the Governing body, who will not be involved in the headteacher's performance management or any appeal regarding the headteacher's performance management to ensure that it 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 process of moderation and quality assurance when the performance management policy is reviewed.

### **Objective setting**

The objectives set will be rigorous and challenging, but 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 their professional duties and the time required to pursue his personal interests outside work, consistent with the school's strategy for bringing downward pressure on working hours. They should take account of the teacher's professional aspirations. They should be such that, if they are achieved, they will contribute to improving the progress of pupils 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 3 objectives per cycle of which at least one may reflect a whole school/team objective.

Though performance management is an assessment of overall performance of teachers and the headteacher 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.

At the review stage 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 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 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 headteachers have a right of appeal against any of the entries in their planning and review statements. Where an appeal is lodged on multiple entries they will all be determined at the same appeal hearing. Details of the appeals process for this school are in the school's pay policy.

## **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 account of the training and development needs of teachers, including the instances where it did not prove possible to provide any agreed CPD, 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 towards meeting their performance criteria where the support recorded in the planning statement has not been provided.

## **APPOINTMENT OF REVIEWERS**

For the headteacher

### **A. Appointment of Governors**

The Governing Body is the reviewer for the headteacher and to discharge this responsibility on its behalf will appoint 3 governors

### **B. 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 headteacher.

For teachers

The headteacher will be the reviewer for those teachers they directly line manages and will delegate the role of reviewer in its entirety to other line managers.

In this school, the maximum number of reviews that any line manager will be expected to undertake per cycle is 4.

Where a teacher has more than one line manager the headteacher 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 headteacher may perform the duties themselves 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 head teacher 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 October and for headteachers by 31 December.

The performance management cycle in this school, therefore, will run from October to October for teachers and December to December for the headteacher.

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.

For teachers who start their employment at the school part-way through the school's performance management cycle, the head teacher will make appropriate arrangements for their performance to be managed during the remainder of the academic year.

For teachers already employed at the school who transfer to a new post within the school part-way through a cycle, the headteacher will determine whether to begin the performance management cycle again and whether to change the reviewer, depending on the extent to which the teacher's responsibilities and job description have changed.

## **RETENTION OF STATEMENTS**

Performance management planning and review statements will be retained for a minimum period of 6 years.

## **MONITORING AND EVALUATION**

The governing body will monitor the operation and outcomes of performance management arrangements.

The headteacher 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.

The headteacher will also report 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.

## **REVIEW OF THE POLICY**

The Governing Body will review the performance management policy every school year at its Spring term meeting cycle.

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, associated guidance 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 provided for heads of department and extra copies can be obtained from the head teacher's PA.

### **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.

## **ANNEX 1**

## **CLASSROOM OBSERVATION PROTOCOL**

The Governing Body is committed to ensuring that classroom observation 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;
- respect the confidentiality of the information gained.

Formal 'whole lesson' classroom observations will not regularly take place at Walton High School and do not form part of the performance management process. The only exception to this is staff who are new to the profession and where full observations are required as part of their induction support process.

Instead of 'whole lesson' classroom observations, regular learning walks will take place to gather information regarding strengths and development areas for teaching and learning both at a departmental level as well as at a whole school level. These walks will be undertaken by leadership group members and relevant curriculum leaders. The purpose of these learning walks is to focus on the teaching and learning in the school.

Individual staff will not routinely receive formal verbal feedback unless they request it but they will receive a courtesy email to thank them with a few notes from the observer. Once department T&L walks have taken place, the head of department will receive, in writing, comments from the LG member which outline departmental strengths/ areas for development.

Where evidence emerges about the reviewee's teaching performance which gives rise to concern during T&L walks, additional observations may be arranged in addition to any other planned observations subject to a revision meeting being held in accordance with the Regulations.

Classroom observations will only be undertaken by persons with QTS under the direction of the headteacher.

There will be no more than 40 drop-in(s) per teacher per academic year, usually not exceeding 10 minutes.

Drop-ins will only inform 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.