



St. Joseph's R.C. Primary School

Performance Management Policy

“Recognition of the humanity of the employees should ensure management work in creative partnership with the employee” (The Common Good, The Bishops’ Conference-October 1996)

At St. Joseph’s Performance Management will form part of the whole cycle for school improvement, school self-evaluation and staff development planning. It will be a positive experience acknowledging the aims of the school and promoting the Gospel Values.

1. Introduction

At St. Joseph’s we believe that Performance Management has the potential to develop all staff:

- Spiritually and academically,
- To improve teaching.
- To raise standards of achievement.
- To raise standards of learning for all our pupils.

This policy covers all teaching staff, except those on contracts of less than one year and those in their NQT induction year/s.

All staff have been consulted in developing this policy. It sets a framework for all staff to agree and review priorities and targets within the context of the School Ethos and Mission Statement, School Improvement Plan and their own professional needs. Similarly, the School Improvement Plan and the School’s Self Evaluation Form are key documents for the performance management process.

Performance management will involve three stages:

- Stage 1: Planning (Agreeing targets and completing an Individual Plan)
- Stage 2: Monitoring (Teaching, planning, assessment and progression of targets)
- Stage 3: Review (End of year progress report)

2. Rationale

Performance Management means a shared commitment to ensuring high performance, to developing and maintaining the Catholic Ethos and to raising the standards of learning and teaching. Therefore,

both staff and pupils will benefit.

Performance Management will focus attention on raising efficiency and effectiveness and to monitoring systems, enabling standards to be raised.

It involves providing appropriate and effective personal training and development to ensure job satisfaction, a high level of expertise and progression for staff in the teaching profession.

We seek to improve school performance by developing the effectiveness of teachers, both as individuals and as part of a team in our Catholic school.

The Governing Body is committed to ensuring consistency of treatment and fairness in the operation of performance management.

We will implement our performance management arrangements on the basis of:

- (a) **Fairness and transparency;** we all need to be aware of the potential for unconscious discrimination.
- (b) **Equal opportunity:** all teachers will be supported to achieve their potential, including the potential to make a full contribution to the distinctive nature of our Catholic school. They will be encouraged and supported to achieve their potential through agreeing objectives, undertaking development and having their performance assessed.

3. Roles

Performance management is a shared responsibility. The governing body has a strategic role in agreeing the school's performance management policy, ensuring that the performance of teachers at the school is regularly reviewed and for monitoring the performance management process.

The head teacher is responsible for implementing the school's Performance Management Policy and ensuring that performance management reviews take place.

Performance Management means that we work together as a team, making sure that targets are discussed and agreed and that they encompass all aspects of the work of the school including its mission in Catholic Education.

To this end.

- Regular and objective feedback will be given.
- Achievement and progress will be affirmed.
- Adequate training will be provided.
- Performance reviews will take place as scheduled.

An external advisor will provide advice to the governing body's representative on the setting of targets/ objectives for the head and will support them in reviewing performance at the end of the review cycle.

4. Responsibility for Reviews

The Governing Body will appoint three governors to carry out the Head teacher's performance management review. Two of these will be foundation governors. These will be done in conjunction with the Challenge Adviser.

The Head teacher has responsibility for reviewing all teaching staff.

5. Timetable for Performance Management

Whole school Issues

The annual performance management cycle links with our planning for school management, school improvement and target setting.

Account will be taken of individual professional development targets, linked to school targets, LA targets and national targets.

Our timetable is shown below:

(a) Objectives set in the Autumn Term

These will inform and support our school management policies for the following financial and academic year. We will take account of professional development objectives in setting the school's overall priorities for staff development.

(b) Monitoring and feedback

This will be ongoing throughout the year and may include:

- Up to three classroom observations. It is not a requirement to observe Head teachers with teaching responsibilities.
- Work sampling.
- Planning.
- Discussion and support regarding: The staff members' contribution to the development of the ethos and mission of the school.
- Curriculum and managerial targets.
- Impact on courses attended externally or internally.
- Progress of pupils.
- Listening to learners.
- Learning walks.

(c) Formal Reviews in Autumn Term

The annual review of the teacher's performance will use the recorded objectives as a focus to discuss his/her achievements and identify any development needs. Account will be taken of School based target setting data (Based on teacher assessment and annual test results), TA's and other individual needs i.e., ALN. It is a feature of the school that individual needs and circumstances always inform our planning, target setting and decision making for our pupils. Following the review, a new individual plan will be completed for each teacher identifying areas for development and how these will be met.

recognising personal development needs; and agreeing new clear objectives and completing an individual plan for the year ahead.

This process will inform the School Improvement Plan taking account of national initiatives. And this process will be repeated annually.

6. The Performance Management Cycle.

The Governing Body is responsible for performance review and for agreeing the performance management policy. The Head teacher 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.

1. Self analysis

Each member of staff will use this process as a preparation for a discussion aimed at agreeing specific objectives for the coming year. The School Improvement Plan, self-analysis/evaluation and guidance notes will be used for this purpose.

The teacher should focus on both personal needs, professional and spiritual, and on what will be needed to ensure that pupils make good progress.

2. Planning

The process will start with a clear job description taking account of the distinctiveness of our school as a Catholic School supporting the mission of the Church.

The next step is to discuss the teachers' priorities, the needs of the pupils and personal priorities and to agree specific targets for the coming year. The focus of this discussion will be the progress of pupils in its widest sense and the way the teacher can best engage and realise the potential of pupils through his/ her teaching. The SIP will provide important background information as will assessment information about the prior attainment of pupils.

Performance targets will be agreed and relate to both the teacher's professional development and pupil progress, using the policy for target setting so they are professionally valid. Both qualitative and quantitative goals can be set.

Targets will be clear and concise about what is to be achieved. They will be **Specific, Measurable, Achievable, Realistic and Time-** related. They will not be set in the unrealistic or in the comfort zone. They will be set in the **challenge** zone. They will be flexible and may need amending according to circumstances. When targets span more than one year, milestones will need to be set.

The Leader's role is to ensure that:

- Each teacher understands what the project involves, is able to achieve them, and understands when and how they will be reviewed.
- Where it is likely that factors outside the teacher's control may affect the achievement or targets this will be discussed with the teacher at the outset
- The individual teacher's targets relate to the objectives in the School Improvement Plan.

A teacher's Individual Plan, agreed with the team leader will record the teacher's responsibilities as

a basis for the performance review. The teacher can add or comment on the targets. Strengths and priorities for development will be identified.

Professional development opportunities are needed to support agreed objectives, to develop strengths and address areas for development or professional growth. The development page of the individual plan will be used to record action.

3. Monitoring Progress

The teacher and Headteacher will keep progress under active review throughout the year using classroom observation and other relevant information. They will discuss any supportive action needed and keep development plans up to date. Teachers are encouraged to keep a CPD portfolio to aid this e.g., Professional Learning Passport (and as a reference for Threshold Assessment).

Classroom observation is accepted good practice and will also form part of the review.

4. Self Evaluation

Performance management and reviews are more valuable if the teacher has reflected in advance on the work of the year, on strengths, areas that are developing and areas that are a priority for development.

In addition to the School Development Plan and Self-evaluation, teachers should reflect on:

- Their own assessment of his/ her performance against the targets set at the start of the cycle.
- The benefits of training and impact on practice.
- Any factors the teacher considers affected his/ her performance against the set objectives.

5. Reviewing Performance

The focus of the review is on how to raise performance and improve effectiveness, whilst ensuring that the school's ethos and mission statements are evident throughout their practice. It will involve:

- Discussing the school's Ethos and Mission statement.
- Ensuring that all stakeholders have ownership of the above.
- Reviewing, discussing and confirming the teacher's essential tasks, objectives, and standards.
- Recognising and affirming strengths and achievements – taking account of circumstances beyond the teacher's control.
- Confirming action agreed with the teacher at other reviews.
- Identifying areas for development and how these will be met.
- Recognising individual and professional development needs.
- Agreeing new, clear targets and completing an individual plan for the year ahead.

The Head teacher will evaluate the teacher's performance; highlighting the extent the targets have been met.

The review will take account of the stage of the teacher's career- for example, NQT, 2-3 years' experience, threshold, middle manager, senior manager.

The process will be respectful of the vision, mission and principles of the school to which a member of staff has been contracted (CES Contract) on being appointed to a Catholic School.

Within ten days the team leader (Head teacher) will write a written review statement recording the main points made at the review meeting and the conclusions reached, including any development needs and activities which will be recorded on a separate proforma.

Within 10 days of having access to this report the teacher will add to it his /her comments in writing. It will be good practice for this process to be a speedy one, whilst facts are fresh in the team leader's memory.

Links between performance management, pay and career progression

Induction

The final meeting of this process will inform the target setting process and professional development opportunities as the first stage of the teacher's subsequent performance management cycle.

Up to Threshold

Teachers can expect an annual increment if they are performing satisfactorily.

Threshold

The process will inform the Head teacher for teachers who apply using the Threshold Application Form

Pay Points above Threshold

Reviews will form part of the evidence, which, as a school, we can use to arrive at a decision about awarding performance pay points to eligible teachers.

Managing performance

Good management, with clear expectations and appropriate support, will go a long way towards identifying and handling weaknesses in performance. Performance review does not form part of any formal disciplinary or capability procedures. Capability procedures are outlined in the school policy.

However, where information from the review gives rise to concern about the capability of the teacher, it may lead to a decision to investigate and record performance more intensively. Where a decision is taken to enter into a formal capability procedure, that procedure supersedes performance management arrangements.

Confidentiality

The individual plan and the review statement are personal; and confidential documents and will be kept in the Head teacher's office in a secure place. The principles and provisions of the Data protection Act 1998 will be followed.

Access to outcomes

There will be two copies of the review statement- one held by the teacher and one by the Head teacher to which the team leaders or governors with responsibility for pay could request access. The Headteacher's review will go to the lead performance management governor, Mr R Davies.

Information from the performance review will be made available as listed:

- The Head will ensure that individual training and development needs are reflected in the School Improvement Plan and the programme for professional development (INSET)
- The Head will ensure that training and development needs are met.
- The Head will report to the Governing Body annually on performance management in the school, including the effectiveness of performance management procedures and the training and development needs of teachers. This will be in the light of the distinctive nature of the policy in a Catholic School.
- The Head will keep all review statements for at least 3 years.

Complaints

The review:

Teachers can record their dissatisfaction with aspects of the review statement within ten days of receiving the written statement. The Head teacher is responsible for reviewing the complaint and may amend the statement, or order that parts of the review or the whole review be repeated. Where these cannot be resolved with the Head teacher, the teacher can raise the issue with the Chair of Governors.

Head teachers 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 teacher's review to act as review officer. No governor who is a teacher or staff member can be involved in performance review.

Where a new review is ordered new governors will be appointed to carry out the review of the Head teacher. For teachers, the Head teacher will appoint a new team leader. Any new review or part review ordered should be conducted within a further 15 days.

Monitoring and Evaluation

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

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 governors responsible for reviewing the performance of the Head teacher will:

- Seek advice from the appointed external adviser when setting objectives and reviewing the performance of the Head teacher.
- Meet with the Head teacher and adviser at the start of the performance review cycle to plan and prepare for the performance review and set and record Head teacher objectives relating to school leadership and management and pupil progress.
- Meet with the Head teacher and adviser 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 Head teacher within 10 days of the review meeting and allow 10 days for the Head teacher to add written comments.
- Provide the Head teacher and chair of the governing body with a copy of the head teacher's performance review statement.
- On request, provide a copy of the head teacher's statement to those governors who are responsible for taking decisions in relation to promotion and pay, who should take account of this when making such decisions.

The Head teacher as part of their Performance Management

will:

- Meet with the appointed reviewers and external adviser to agree objectives 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 objectives.

may:

- Add written comments to the record of objectives set by his reviewers
- 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

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 a year, as the teacher will move onto the new school cycle.

Signed: Mr J. McMorro Headteacher

Signed: Mr R. Davies Chair of Governors

Date: September 2024

Review Date: September 2025