

PERFORMANCE MANAGEMENT POLICY (STAFF WITHOUT QTS)

Name of School: Headlands Primary School

Person(s) Responsible: Headteacher

Review Date: June 2013

Distribution: Governors and whole staff

Web Page: www.headlandsprimary.co.uk

Policy written October 2000 - Mrs. Julie Hill (Previously Staff Appraisal Policy)

Reviewed October 2001 by Mrs. Sue Deighton. Alterations to pages 1-6 inclusive.

Reviewed September 2002 by Mrs. Sue Deighton. Minor alterations pages 1,3,4,7 and 9

Reviewed September 2003 by Mrs. Sue Deighton. Alterations to pages 3, 4, 7, 8, and 9.

Reviewed October 2004 by Mrs Sue Deighton. Alterations to page 3 Performance Management Teams for September 2004.

Reviewed October 2005 by Mrs Sue Deighton. Alterations to page 3 Performance Management Teams for September 2005

Reviewed June 2006 by Sue Deighton. Alterations to be discussed with all staff at the beginning of the Autumn Term 2006. Further review to take place after training for HT, DHT and AHT in November 2006 with regard to new initiatives.

Rewritten September 2007, following RIG recommendations by Mr Andrew Lakatos. School now has two performance management policies. One for teachers (those with QTS) and other staff (those without QTS).

Slight amendments December 2007. This policy was made appropriate to those members of staff who do not have qualified teacher status.

Reviewed June 2009 by Sue Deighton – no changes needed.

Reviewed June 2011 by Personnel - no changes

Performance Management is a process to support the development of all staff to improve teaching and learning, in addition to raising standards of achievement for all children and conditions for employees. This policy focuses on the processes and systems in place for those members of staff who do NOT have Qualified Teacher Status QTS. (with the exception of any staff in their induction year).

Performance Management involves both a reviewer and the staff member (the reviewee) working together to ensure that objectives are discussed and agreed, adequate advice and training is provided and that the performance review takes place.

Appropriate reviewers will be appointed each academic year.

This policy sets a framework for all staff to agree and review priorities and objectives within the context of the school's development plan and their own professional needs.

The Performance Management Policy aims to promote a shared commitment to high performance. In addition, it helps to focus attention on developing more effective strategies for teaching and to raise the quality of teaching and learning in an educational environment that is conducive to learning. The school will aim to provide appropriate and effective personal training and development to ensure job satisfaction, a high level of expertise and progression of staff in their role.

Within the Performance Management Cycle of staff without QTS they must:

- Engage constructively with the performance management process and take an active role in the setting of appropriate targets at the beginning of the academic year. Targets will focus on improving pupil performance and personal development.
- Be observed teaching at least once annually by their reviewer OR attend a formal interim-review meeting regarding their performance part way through the year
- Attend an annual review meeting with their reviewer at the end of the academic year.
- Agree objectives which relate to developing and improving their professional practice as well as pupil progress.

The school policy may reasonably ask those members of staff without QTS to:

- Reflect on and evaluate their own performance against objectives in preparation for the review meetings
- Be observed in performance management focussed observations of their teaching (where working directly with children).
- Engage constructively in a professional dialogue about their practice and how it could be improved.

The Role Of The Governing Body

Although the Performance Management of staff without qualified teacher status is not a statutory obligation, Headlands Primary School recognises the valuable contribution the process makes to the overall performance of the school and the individual. As such the governors have decided to implement a policy for all staff members without QTS.

Performance Management is a shared responsibility. The Governing Body has a strategic role in agreeing the school's policy, monitoring the process and ensuring that the performance of all staff is regularly reviewed. The Headteacher is responsible for implementing the school's performance management policy and ensuring that reviews take place.

PERFORMANCE MANAGEMENT TEAMS FOR SEPTEMBER 2007**MR LAKATOS**Mrs M Oakman
C Centre Manager

Mr C Eldred

Mrs M Seymour

Mrs A James

Mrs A Sly

MRS S DEIGHTON

Mrs S Heasman

Miss D Silk

MRS V CULBARD

Mrs J Hynes

Mrs F Henry

MRS M SEYMOUR

Ms S Dexeter

MR C ELDRED

Mrs C Connelly

Miss P Wilkes

Mrs S Timlin

Mrs S Coughlan

Mrs K Toms

Mrs R Jeffs

NURSERY COORDINATOR

Mrs A White

Mrs L Gray

Mrs L Jelley

0.5CCTeacher

MRS C CLARKE

Swimming Teacher

MRS M OAKMAN

Mrs C England

CLASS TEACHERS

Teaching Assistants in their class

A SLY

Site Supervisor, Cleaners

C Centre Manager

Information Officers, Family Support Worker

Performance Management Cycle

The Performance Management cycle operates on a continuous one year cycle. It links in with the targets on the School Development Plan and continuous professional development programme of the school. Performance Management is an ongoing cycle involving 3 stages:

- (i) Planning meeting and agreeing objectives for year
- (ii) Classroom observation or interim review meeting (as deemed appropriate)
- (iii) Review meeting (discuss progress towards agreed objectives)

Stage 1: Planning meeting (agreeing objectives and reviewing job description)

- The initial planning meeting will ideally take place before the end of the term 2 at a pre-arranged date and time.
- During the meeting the reviewer and reviewee will agree objectives for the forthcoming year.
- Staff without QTS should expect no more than 2 objectives.
- All staff will be given an objective that is derived from the school development plan which will be based on pupil performance.
- Reviewers will agree objectives in consultation with the reviewee. These objectives may include personal development objectives or whole school development objectives as appropriate.
- In agreeing objectives, key areas will be focussed upon. The range of objectives, will match the nature of the responsibilities of the post holder.
- Records of performance management will only be viewed by the reviewer and the Headteacher. Reviewees should store the planning meeting information in their professional portfolio. A copy of all information will be given to Headteacher and stored in individual staff members file. Please use **appendix 2** for recording objectives,.
- Any training opportunities identified as part of this process will be recorded on **appendix 3** and should be given to the CPD co-ordinator for processing.
- Identified training, will inform and support the school development plan priorities for the current financial and academic year. Professional development objectives will be taken into account when setting the school's overall priorities for staff development.
- Also at this meeting the job descriptions will also be reviewed and agreed as accurate accounts of the main responsibilities and duties carried out by the post holder. If amendments are needed they will be agreed at this meeting.

Stage 2: Classroom observation or Interim Review

- Where appropriate, members of staff without QTS will be observed teaching in their normal class. The observation will have an agreed focus.
- The length of observation will vary according to focus areas of development but will be no longer than 30 minutes (**see appendix 5**).
- Feedback following observation will occur soon after, at a mutually agreed time (**see appendix 6** for guidance).
- Feedback will be given sensitively (**see appendix 7**)
- The observation will be formally recorded. (**appendix 8**).
- The reviewer and reviewee will keep progress under active review throughout the year.
- As part of this stage, the reviewer will ensure any training opportunities previously identified have been planned or attended.
- Alternatively it may be felt appropriate that a formal meeting be held to discuss progress towards the objectives set rather than an observation. This will be agreed at the review meeting if felt appropriate.

Stage 3: Review meeting

The Review meeting will evaluate the success of overall performance which will include:

- progress against agreed targets
- outcomes of classroom observation OR review of interim review meeting notes
- any other relevant evidence which may include consultation with other members of staff as appropriate.

The review meeting will be held by the end of term 6. The review meeting comments should be recorded on **Appendix 9** entitled review statement.

The reviewer should evaluate the member of staff's overall performance, including an assessment of the extent to which objectives have been met, and their contribution to the life of the school during the review period. The review should take into account the experience of the individual.

Soon after the review meeting, the reviewer will prepare a written review statement recording the main points made at the review and the conclusions reached

Once written, the reviewer will give the reviewee a copy of the statement. They may, within 10 working days of first having access to the statement, add to it comments in writing. Good practice shows us that the review statement should be written as soon as possible after the review, whilst the facts are still fresh in memory. Records of performance management will only be viewed by the reviewer and the Headteacher. Reviewees should store the observation and feedback form in their professional portfolio. A copy of the form will be given to Headteacher and stored in individual staff members file.

Managing weak performance:-

Good management, with clear expectations and appropriate support, will go a long way towards identifying and handling weaknesses in performance.

Relevant information from review statements may be taken into account by those who have access to them in making decisions and in advising those responsible for taking decisions, or making recommendations about performance, pay, promotion, dismissal or disciplinary matters.

Confidentiality:-

All performance management documents are personal and confidential and should be kept in a secure place. The principles and provisions of the Data Protection Act 1998 should be followed at all times by those who have access to the documents. Team leaders must seek permission of the resource manager to gain access to these documents.

Complaints:-

With regard to the setting of objectives:

- Ideally both the reviewer and reviewee should agree the targets set. The reviewee should understand this is a developmental process that has the aim of improving their performance. If targets cannot be agreed then the reviewer has the final say.
- The reviewer has the option of recording their dissatisfaction on the proforma if they feel the targets set are not appropriate.
- The Headteacher may choose to investigate such additional comments.
- The Headteacher may choose to add further comments to the review statement following the investigation.

With regard to the review meeting, within 10 days of receiving the review statement:

- Reviewees can record their dissatisfaction with aspects of the review on the review statement.
- The Headteacher may choose to investigate such additional comments.
- The Headteacher may choose to add further comments to the review statement following the investigation.

Evaluation and review:-

As a school we are committed to ensuring that all staff, teams and the school continues to improve.

The Governing Body and the Head will check that effective and challenging objectives are set, that all reviews are completed on time and the standard of performance is consistently applied in school.

The policy will be evaluated on an annual basis to continually improve the standards of teaching and learning.

We will update and amend the documentation and the process as required, after consultation with all staff, to incorporate any major changes introduced either by the DfES or the school to ensure the policy is up-to-date and effective in our school.

PERFORMANCE

MANAGEMENT

APPENDICES

Appendix 1

The following principles will be taken into consideration when discussing targets:

- The team leader should ensure that the staff member understands what his/her targets involve, is in a position to achieve them, knows what they need to do to achieve them and understands when and how they will be reviewed;
- Objectives are clearly and concisely written and are measurable;
- Objectives focus on issues/matters over which a member of staff has direct influence/control and takes into account social, cultural and other external influences on pupils
- Objectives for each staff member should relate to the targets in the school development plan and any team plans as well as his/her own professional needs.
- Professional development opportunities may be needed to support agreed targets, to develop strengths and address areas of professional growth as appropriate.

PLANNING RECORD

Reviewee: _____

Reviewer: _____

Job titles: _____

Date of meeting: _____

Objectives:

1)

2)

3)

Development and training:

Arrangements and resources to support the objectives:

Reviewees should be informed that other relevant staff may be consulted during the year where they have knowledge of the individual's work.

Job description reviewed? Were there any amendments made? Please attach amendments.

Please ensure you have agreed whether an observation or interim-review meeting has been agreed.

Reviewees comments:

Reviewee: _____ (sig.) Reviewer: _____ (sig)

Date: _____

Continuous Professional Development

Training Needs Identified Form

Name of Reviewee: _____

Name of Reviewer: _____

Training needs that have been identified _____

Please state what aspects of this training can be identified within
the School's Development Plan. _____

Preferred type of training [course, observation, training day etc.]
with course details where appropriate. _____

Signed [reviewer] _____

In planning observations, we will follow these principles:

- successful observation requires preparation and a clear understanding of its purpose on the part of the staff member and team leader.
- the nature of the observation will be to support and challenge each member of staff.
- it is important that the observer ensures that the work observed proceeds in as normal an atmosphere as possible;
- Full, constructive and timely feedback will offer an opportunity to discuss what went well, what might be done better or differently next time.

PROVIDING EFFECTIVE FEEDBACK

Feedback is the most important part of the monitoring process. As such, it is important to maximise the impact by ensuring the feedback is effective. Effective feedback is characterised by:

- The quality of the relationship between the members of staff. This relationship should be built on professional trust, knowledge, respect and understanding
- The quality of the feedback information. It should be related to evidence, based on standards, discussed, negotiated and agreed in protocols
- Offering opportunities for open dialogue. This should involve a two-way exchange of views ensuring staff member comment and response feeds into evidence based judgements.
- Agreeing constructive outcomes. Together, seek to find ways forward, strategies and solutions that will have a positive impact on standards in learning and teaching.

In general, when engaged in feedback you should ensure:

- Judgements that are clear and accurate that are supported by evidence.
- Feedback is balanced and recognises strengths as well as areas for further development.
- That a relaxed but focussed atmosphere is established
- The focus is on the activity and learning outcomes NOT the person.
- Opportunities for discussion are offered.
- The member of staff is not overwhelmed with areas for development.
- Priority is given to those 1/2/3 aspects which will make the biggest impact on improving learning and teaching.
- Helpful advice which leads to action underpins all targets
- Improvement is acknowledged as soon as it is seen.
- Feedback refers to the pre-agreed criteria
- Judgements refer to the evidence and are specific.
- Recommendations refer only to things that can be changed, developed or improved

Below is a list of useful thoughts for you to consider when offering feedback:

- It is going to be helpful, say it
- If you cannot recommend an alternative, don't say it yet
- Think about the language which you use
- Think about the body language which you use
- Don't give anything in writing which hasn't been discussed or had the opportunity for discussion

Remember when offering feedback:

- Show respect
- Show understanding
- Listen actively
- Question
- Remain Focused
- Summarise
- Negotiate Set targets for improvement
- Ensure that issues in need address are addressed

CLASSROOM/WORK OBSERVATION FEEDBACK RECORD

Date of observation: _____ Class observed _____

Date of feedback: _____

Strengths:

Areas for development:

Reviewees comments:

Reviewee: _____ (sig)

Reviewer: _____ (sig)

REVIEW STATEMENT

Reviewer: _____

Job title/s:

Summarise relevant information concerning assessment of performance, including achievement of individual objectives:--

Views of other members of staff (if appropriate)

Statement agreed by: (signature and date)

Reviewer: _____ date: _____

Reviewees comments:

Reviewees signature: _____ date: _____

Headlands Primary School



Non-Teaching Staff Performance Management Policy