

Marina International School

Performance Management Policy

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Introduction

At Marina International School we are committed to performance management in order to develop all staff, improve teaching and to raise standards of achievement for all students. This policy covers all teachers and support staff except those on contracts of less than one year. It sets a framework for staff to agree and review priorities and objectives within the context of the school's development and staff's own professional needs.

1. Rationale

Performance management is about a shared commitment to high performance. It helps to focus the attention of all staff and enables them to become more effective, both as individuals and teams. It means providing appropriate and effective personal training and development to ensure job satisfaction, a high level of expertise and progression of staff in their chosen profession. Through the development of staff we aim to improve the service we provide and raise the quality of education offered to all students. The evidence is that standards rise when school support staff and individual teachers are clear about what they expect students to achieve. Implementation is based on:

- I. Fairness. We all need to be aware of the potential for unconscious discrimination and to avoid assumptions about individuals based on stereotypes; and
- II. Equal Opportunity. All staff should be encouraged and supported to achieve their potential through agreeing objectives, undertaking development and having their performance assessed.

2. Roles

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

The Board of Governors ensure in budget planning that as far as possible, appropriate resources are made available in the school budget for any training and support that is necessary for the reviewees.

Performance management involves both the line manager/reviewer and the member of staff working together to ensure that objectives are discussed and agreed; regular and objective feedback is given; adequate coaching, training and development is provided and that the performance review takes place. An External Adviser may provide advice to the Board of Governors representatives on the setting of performance objectives for the Head of School and may support them in reviewing performance at the end of the review cycle.

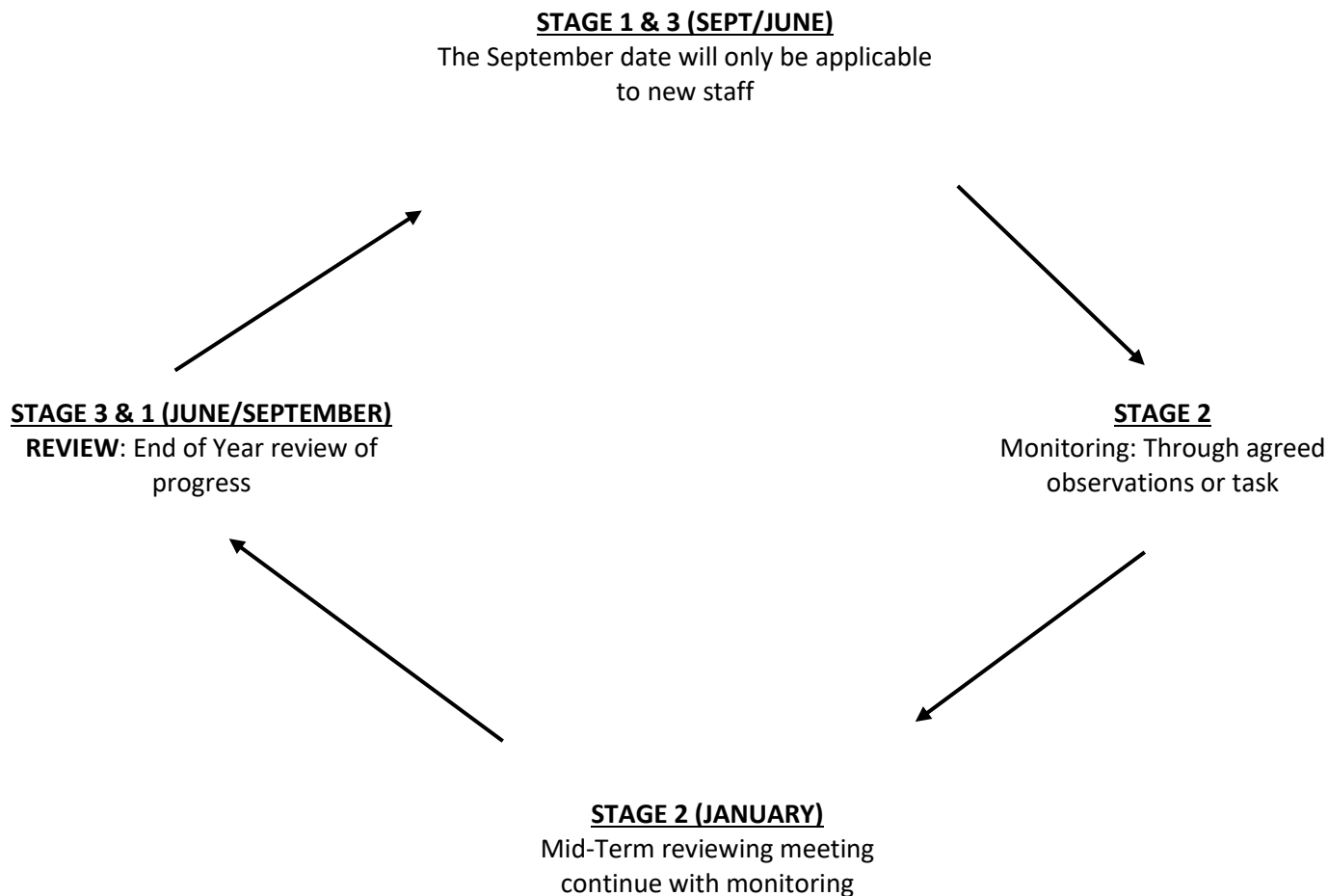
3. Responsibility for Reviews

Nominated governors carry out the Head of School's performance management review. The Head of School will decide who shall act as line manager/reviewer for each member of staff on the basis of responsibilities for learning in the school, a judgement about who has the best overview of the staff member's work and the ability to provide support to staff. In doing this, the Head of School has delegated responsibility to an appropriate line manager/reviewer and has ensured that each reviewer is responsible for a limited number of reviews.

4. Performance Management Cycle

Performance Management is set in the context of our school's plans for development

Performance Management is an ongoing cycle, not an event, involving 3 stages: planning, monitoring performance and reviewing performance. The end of year review Stage 3 and Stage 1 may happen at the same time.



Stage 1: Planning - Each staff member will discuss and agree objectives with their line manager or reviewer and record these in an individual plan (an example of a blank individual plan is attached at Annex A). For staff on their probationary period this will take place as part of their probationary process. Objectives should be challenging but realistic and take account of their job description and their existing skill and knowledge base.

There can be no hard and fast rule about how many objectives there should be. But the range of objectives should match the nature of the job, including leadership or management areas as appropriate. Where someone has a wide range of managerial duties, objectives might focus on specific areas of this work.

Agreeing objectives does not mean itemising every activity but picking out key expectations and yardsticks.

Teacher objectives will cover student progress as well as ways of developing and improving teachers' professional practice. The Leadership and Management Team and those with positions of responsibility will have objectives relating to their additional responsibilities. The Head of School's objectives will cover school leadership and management as well as student progress.

Principles for setting objectives are as follows:

- the line manager or reviewer should ensure that the member of staff understands what his or her objectives 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 written clearly and concisely and are measurable
- objectives focus on issues/matters over which they have direct influence and control and take into account fully the wider socio-economic, cultural and other external influences on students
- objectives for each employee should relate to the objectives in the school strategic plan and any departmental or team plans as well as to his/her own professional needs

The line manager/reviewer records the objectives which will apply for the review period. These should be jointly agreed if possible. If there are any differences of opinion about the objectives the employee may add comments to the written record of objectives.

If the Head of School and the Board of Governors representatives are unable to agree objectives, the Governors appointed to review the performance of the Head of School should set and record the objectives. The Head of School may add comments to the written record of objectives.

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 is used to record action. The school Business and nAdministration Manager should be informed of any training needs.

Stage 2: Monitoring Progress - The employee and line manager/reviewer will keep progress under active review throughout the year using classroom observation (for teachers and learning assistants) and other relevant information. They will discuss any supportive action needed and keep development plans up-to-date. A mid-term review meeting will be held and notes added to the review statement. For staff in their probationary period this should take place in line with the probationary period policy.

For teachers and learning assistants, classroom observation is accepted good practice with a minimum of four observations each year required, supplemented by any further observation of lessons which are agreed to be useful for developmental purposes or as indicated during the probationary period. For support staff observations may be appropriate depending on the targets that have been set.

During the monitoring process, if there are concerns regarding how a member of staff carries out their professional duties including but not limited to planning, teaching, marking, feedback, supervision and in loco parentis responsibilities, the following steps would be applied.

Level 1 (informal) - the member of staff will be informed.. The member of staff will be given the opportunity to discuss the concerns. The likely outcome of this level is the member of staff being issued with guidance on what needs to be done to improve their performance and a warning that failure to improve could result in the next level of the process being instigated.

Level 2. Where **Level 1** does not lead to satisfactory improvement, a formal review meeting (**Level 2**) would be instigated with the aim to have a performance improvement plan in place agreed by all (although the school reserves the right to insist on any aspect of the performance improvement plan in the absence of such agreement). The plan will clearly identify reasonable timescales (this will vary from role to role), targets, support to be provided by the school, review dates (review at regular intervals with a final review date specified). The plan will also specify that failure to improve within the specified reasonable timescale may result in the matter being referred to a **performance dismissal hearing - Level 3** - (in line with the school's disciplinary policy).

Principles for observing teaching:

- preparation and training, and a clear understanding on the part of the member of staff and line manager/reviewer of its purpose must be undertaken
- the nature of the observation should fit its purpose
- it is important that the observer ensures that the lesson proceeds in as normal an atmosphere as possible
- full, constructive and timely feedback offers an opportunity to discuss what went well, what might be done better or differently next time. When giving feedback, the line manager/reviewer should take into account the range of activities carried out, and the time spent on each activity

For teacher observations the standard proforma for observations as attached at Annex B is to be used. The original should be kept by the member of staff and a copy should also be filed in the performance management file in the Head of Schools' office.

Stage 3: Reviewing Performance: The annual review of performance will use the recorded objectives as a focus to discuss his/her achievements and identify any development needs.

The focus of the review is on how to raise performance and improve effectiveness. It involves:

- Reviewing, discussing and confirming the staff member's essential tasks and objectives
- Recognising strengths and achievements and taking account of factors outside the staff member's control

- Confirming action agreed with the teacher or member of support staff at other reviews
- Identifying areas for development and how these will be met
- Recognising personal development needs

The line manager/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. It should take account of the stage they are at in their career.

Within 10 days of the review meeting, the line manager/reviewer will prepare a written review statement recording the main points made at the review and the conclusions reached, including any identified development needs and activities recorded in a separate annex (but forming part of) the review statement. Once written, the line manager/reviewer will give the employee a copy of the statement. The employee may within 10 days of first having access to the statement, add to it comments in writing. Good practice shows that the review statement should be written as soon as possible after the review, whilst the facts are still fresh in the line manager/reviewer's memory.

5. Probationary Period

The probationary period is part of the performance management process. In the case of teachers the first classroom observation must be carried out in line with the time frame set out in the Probationary Period Policy. Information from the probationary period should also be used to complete the employee's individual plan and be part of the performance management process. The reviewer is responsible for informing the Head of School if at any time during the probationary period that an individual is not meeting the expectations of performance expected by the school and as such may be unsuccessful in their probationary period.

6. Managing Individual Performance

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

The review meeting and review statement do not form part of any formal disciplinary or capability procedures. However, 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 and promotion, renewal of contract, dismissal or disciplinary matters.

7. Confidentiality

The individual plan and the review statement are personal and confidential documents and should be kept in a secure place.

8. Access to outcomes

There will only be two copies of the review statement - one held by the staff member and another held by the school in the performance management file, to which the line manager/reviewer or Governor/s responsible for making decisions regarding pay and contracts could request access. A copy of the Head of School's review statement should go to the Chair of Governors.

Information about performance reviews should be made available as listed below:

- the Head of School should ensure that individual training and development needs are reflected in the school development plan and the programme for professional development
- the Head of School should ensure that training and development needs from the review statement are given to the Administrative or Business Manager
- the Head of School should report annually to the Board of Governors on performance management in the school, including the effectiveness of the performance management procedures in the school, and the training and development needs of staff

The Head of School should keep review statements for at least six years.

9. Complaints

The Review

Within 10 days of receiving the review statement:

Staff can record their dissatisfaction with aspects of the review on the review statement. Where these cannot be resolved with the line manager/reviewer, they can raise their concerns with the Head of School. Where the Head of School is the line manager/reviewer, the staff member can raise the issue with the Chair of **Governors**.

Head of School 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 Board of Governors should appoint one or more Governors who have not participated in the Head of School's review to act as review officer. No governor who is a staff member can be involved in performance review.

The review officer (who could be the Head of School, the Chair of Governors or the Governors appointed by the Board of Governors) will investigate the complaint and take account of comments made by the job holder. The review officer should conduct a review of the complaint within 10 working days of referral. S/he may decide that the review statement should remain unchanged or may add any observations of his/her own. The review officer may decide, with the agreement of the person responsible for carrying out the initial review, or in the Head of School's case all the appointed Governors, to amend the review statement; or declare that the review statement is void and order a new review or part of the review to be repeated. Where a new review is ordered new Governors will be appointed to carry out the review of the Head of School. For other staff, the Head of School will appoint a new line manager/reviewer. Any new review or part review ordered should be conducted within a further 15 days.

10. Evaluation of the policy

The Head of School shall provide an annual report to the Board of Governors on how effective the performance management procedures have been.

As a school committed to ensuring that individual teachers, support staff, teams and the whole school continues to improve, the Board of Governors and the Head of School will check that effective and challenging objectives are set, that all reviews are completed on time and the assessment of performance is consistently applied in the school. We will evaluate the effectiveness of the policy in helping to improve standards of teaching and learning.

As part of our ongoing commitment, the Board of Governors and the Head of School will update and amend the documentation and the process as required, after consultation with staff, to ensure that the policy is up-to-date and effective in our school.

11. Copies of all Standard Documents, which we will use - the individual plan, which includes the review statement and the classroom observation form, can be found attached in the annexes.

12. Links to other policies:

Probationary Period Policy

Disciplinary Policy

13. Time frame

when	Who	what
June for returning staff	line manager/ reviewer and employee	meet and discuss objectives, complete Individual Plan (From September: all staff)
Between September and January	line manager/ reviewer and employee	employee works at objectives, receives training and support line manager monitors progress, makes observation
January	line manager/ reviewer and employee	meet and discuss progress so far complete mid-year notes on Individual Plan
Between January and June	line manager/ reviewer and employee	employee works at objectives, receives training and support line manager monitors progress, makes observation
June	line manager/ reviewer and employee	meet and discuss progress complete end of year notes on Individual Plan complete Review Statement
within first 90 days of being employed	line manager/ reviewer and employee who is in their probationary period	meet and discuss objectives, complete Individual Plan employee works at objectives, receives training and support line manager monitors progress, makes observation and completes Probationary Period Record Sheet at the end of the probationary period

ANNEX A: Individual Plan (to be completed in August when line manager/ reviewer and employee meet)

Name: _____

Job Title: _____ **Date started current job:** __/__/__

Main responsibilities:

Initial Review carried out by: _____

Date of initial review: __/__/__

Period covered by review: __/__/__ to __/__/__

Form A1 to be used for Teachers (Annex A continued)

(to be completed in May / June Objectives (including success criteria e.g. examples of development, training and support and interim milestones, as appropriate)	Success Criteria. I will be successful when:
Objective linked to school development plan: Objective linked to Department development plan: Objective linked to contribution to school community: Objective linked to Position of Responsibility (if applicable): Personal Development Objective:	

[illegible]

Development and training to support achievement of objectives (to be completed by all staff in May) (Annex A continued)

Development and Training (including target knowledge and skills, and target dates)	How to be achieved	Date completed

Comments

Objectives agreed by:

Post holder: _____ **date:** __/__/____

Line manager/reviewer: _____ **date:** __/__/____

Review Statement (Annex A continued)

Form A3 to be used for teachers and completed in May

Name: _____ Job Title: _____

Overall assessment of performance, including achievement of individual objectives (summarising relevant information)

Objectives	met	further development
Personal Development Objective:		
Objective linked to school development plan:		
Objective linked to contribution to school community:		
Objective linked to Position of responsibility:		

Areas of particular strength (specify)

Areas to be developed

Support and resources to be provide by school (specify)

Employee’s comments

Statement agreed by: (signature and date)

Post holder: _____date: __/__/__

Line manager/reviewer: _____ date: __/__/__

Review Statement (Annex A continued)

Form A4 to be used for learning assistants and Non Teaching Staff and completed in May

Name: _____ Job Title: _____

Overall assessment of performance, including achievement of individual objectives (summarising relevant information)

Objectives	met	further development
Personal Development Objective:		
Objective linked to school development plan:		
Objective linked to post:		

Areas of particular strength (specify)

Areas to be developed

Support and resources to be provide by school (specify)

Employee's comments

Statement agreed by: (signature and date)

Post holder: _____ **date:** __/__/__

Line manager/reviewer: _____ **date:** __/__/__

Annex B

Lesson Observation: How to use the forms and information attached to this policy

Observing teachers in the classroom is an important part of improving the effectiveness of teaching and learning. There are three stages: collecting evidence; drawing conclusions based on the evidence; and giving feedback.

Collecting Evidence: Before the observation, the observer and teacher should be clear about the context of the lesson, the activities planned and the learning objectives. This should be done either through discussion or from the lesson plan.

A time/events log might be used to record events during the lesson.

Drawing Conclusions: The observation form covers eight aspects of effective teaching, with a fuller description of each in the guidance sheet. Most if not all should apply to any lesson. The description should help both teacher and observer in assessing the quality of teaching and learning.

The observer then considers for each aspect whether it has been shown to an excellent standard, a good standard, and a satisfactory standard, whether further development is needed or whether the aspect is not applicable or there is not enough evidence to assess it (N/A). Conclusions should always be supported by evidence.

Giving Feedback: The teacher and observer should discuss the conclusions as soon as possible, with the observer giving full and constructive feedback. The teacher should be given the opportunity to record any comments.