

## MEMORANDUM ON IMPLEMENTING THE PERFORMANCE MANAGEMENT POLICIES

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1. The purpose of this memorandum is to explain how the performance management policies for teachers and support staff will be implemented in our school.

### **Appraisal regulations and the performance management policy**

2. The appraisal of teachers is regulated by statutory instrument.<sup>1</sup> The regulations require each school to have an appraisal policy. In our school, the appraisal procedure is included within the performance management policy.

3. Governors must act within the statutory regulations on appraisal and the locally agreed performance management policy.

4. In addition, Ofsted's expectations are clear. Governors should:

- make sure that the appraisal system is incisive and rigorous
- receive 'detailed reports', although the level of detail is not specified
- be satisfied that objectives are linked directly to pupils' progress and the school improvement plan.

5. Neither the regulations nor the policy appear to preclude governors having sight of the objectives set for staff or their annual performance appraisals. Indeed, in order to deal effectively with recommendations on pay, governors are expected to challenge the evidence.

### **Procedures in our school**

6. This memorandum will accompany the performance management policies.

7. The headteacher will continue to be responsible for the implementation of the performance management policies.

8. Governors, normally via the Pay & Performance Committee, will scrutinize the implementation of the performance management policies and consider recommendations from the headteacher on pay progression.

9. The headteacher and other staff responsible for performance management will use a standard template, agreed with the governors, to set objectives to ensure that Smart criteria are met. Objectives will be set and agreed with staff before the first meeting of the Pay & Performance Committee in the Autumn term.

10. At the meeting of the Pay & Performance Committee in the Autumn term, the committee will be shown copies of the objectives set for all staff to ensure that objectives meet the Smart criteria and are linked to the school improvement plan. The committee may not amend the objectives set by the headteacher or deputy headteacher, but may offer observations. The headteacher or deputy headteacher may, if they so wish, consult governors on the suitability

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<sup>1</sup> SI 2012/115 The Education (School Teachers' Appraisal) (England) Regulations 2012

of the objectives in terms of meeting the Smart criteria, addressing pupils' progress and linking with the school improvement plan. Objectives must show measurable outcomes that, if achieved, may be used to support recommendations on pay. Governors may not remove those documents from the meeting.

11. At the meetings of the Pay & Performance Committee in the Spring and Summer terms, the committee will expect to receive a report from the headteacher on the progress of staff in meeting their objectives.

12. At the meeting of the Pay & Performance Committee in the subsequent Autumn term, the committee will be shown copies of all the completed performance management reports, counter-signed by the respective members of staff. This will confirm that the reports have been completed and that the performance management process has been accomplished satisfactorily. Governors may not amend any performance management report and may not retain any copies of those reports.

13. The Pay & Performance Committee may receive recommendations from the headteacher on pay progression. These recommendations must be supported by evidence provided by the headteacher in the form of performance management appraisals and any other relevant material. Governors must be shown copies of this evidence, but may not remove those documents from the meeting. The committee may only accept or reject recommendations from the headteacher in relation to pay progression.

14. The proceedings of the Pay & Performance Committee shall be minuted, but those minutes, insofar as they relate to individual members of staff, shall be treated as confidential.

15. The Pay & Performance Committee will report each term to the relevant committee dealing with personnel matters and annually to the full governing body on the implementation of the performance management policy.