The Chantry School

Performance Development and Review Policy

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1 Introduction:

1.1 Performance Development and Review (the term used at The Chantry to refer to Performance Management or Appraisal) is a process to support the development of all staff to improve teaching, the learning of all pupils and thereby continue to raise standards.

1.2 Performance Development and Review is a supportive process which will be used to inform continuing professional development and growth as a teacher. It is a developmental process with the focus on becoming 'even better' and improving rather than proving. We want to encourage a culture whereby teachers value working collaboratively and seek advice and feedback in order to build and enhance expertise, growth and improvement, irrespective of their career phase, to ensure our pupils benefit from the highest quality teaching.

The process is based on trust, professional dialogue, reflective practice and continuous improvement

1.3 Professional development will be linked to school improvement priorities and to the on-going professional development needs and priorities of individual teachers within departments to further improve pupil outcomes and experience of learning.

1.4 The Review process will recognise and celebrate strengths and successes of individuals and teams at every level.

1.5 This policy sets out the framework for a clear and consistent assessment of the overall performance of teachers and the Headteacher, whilst supporting their development needs with the context of the School Development plan and their own professional needs and aspiration.

1.6 The PDR process should provide a fair and supportive environment, fostering open and constructive conversations about performance and development, and avoiding unnecessary bureaucracy." (from DfE July 2024 guidance)

The school is committed to ensuring that the Performance Development and Review process is proportionate, manageable and does not create unnecessary workload. Evidence should arise naturally from teachers' everyday practice wherever possible.

2 Links to school improvement, school self-evaluation and school development

2.1 The Performance Development and Review process is one of the main sources of information for school and individual self-evaluation and the wider school development process.

2.2 The reviewees' objectives will be aligned to a classroom-based context to improve pupil outcomes and learning experience and an aspect of the reviewee's practice that s/he wants to develop and use evidence informed research to have a direct impact on pupil outcomes.

Where appropriate, professional development should also contribute to improving outcomes for disadvantaged pupils, pupils with SEND and other vulnerable groups

3 Application of the performance review policy

3.1 This policy applies to the head teacher and to all qualified teachers employed at the school/school except those on contracts of less than one term and those undergoing induction *(i.e., ECTs)* or teachers on capability procedures.

4 Consistency of treatment and fairness

4.1 The Governing Body is committed to ensuring consistency of treatment and fairness in the operation of Performance Development and Review. To ensure this, the following provisions are made in relation to moderation, quality assurance and objective setting.

Objectives and review arrangements will take account of part-time working, job share arrangements and other agreed flexible working patterns

4.2 It is the responsibility of the Headteacher to:

1. Implement the policy
2. Provide the Governing Body with an annual written report. The report will not contain any information which would enable any individual to be identified. The report will include:
    a) the operation of the Performance Development and Review policy
    b) the effectiveness of the school's Performance Development and Review procedures
    c) teacher's training and development needs

5 Quality Assurance

5.1 The Headteacher has determined that s/he, the Deputy Headteacher and Assistant Headteachers will undertake the reviewer role for all teachers. The Headteacher and Deputy Headteacher will review those teachers who are entitled to pay progression. There will be a process of moderation of all the Performance Development and Review planning records to check that the plans recorded in the Performance Development Planning records of teachers at the school:

a. Are consistent between those who have similar experience and similar levels of responsibility.
b. Comply with the school's Performance Development and Review policy, the regulations and the requirements of equality legislation.
c. Comply with the school's pay policy.

5.2 The Governing Body will nominate up to three governors, who will not be involved in the Headteacher's Performance Development or any appeal regarding the Headteacher's Performance Development, to ensure that the Headteacher's Performance Development Planning Record is consistent with the school's improvement priorities and complies with the school's Performance Development policy.

6 Objective Setting

6.1 The objectives set for each teacher are intended to contribute to the school's plans for improving the school's educational provision and improving the education of pupils at the school as well as taking into account the professional aspirations of the teacher.

6.2 In this school:

a. All teachers, including the leadership team will have no more than 3;
b. Main-scale teachers will normally have 2 objectives; both closely affiliated to the Teaching Standards and school/department priorities. For 2025-26, the two objectives are linked to the Focus Five initiative:
c. All teachers with a Teaching and Learning Responsibility (TLR), or those on the Leadership Spine, including the Headteacher, will have a responsibility objective, linked to sustaining school improvement through the leadership of Focus Five in their area.

6.3 The agreed objectives will contain clear success criteria and examples of the evidence that may demonstrate progress. Where the use of numerical targets is appropriate, these will be reasonable, in the circumstances in which the teacher works and it will be recognised that factors outside teachers' control may significantly affect success.

6.4 Before, or as soon as thereafter at the start of each Performance Development period, each teacher will be informed of the standards against which that teacher's performance in that Performance Development and Review period will be assessed. All teachers will be assessed against the "Teachers' Standards" published in July 2011.Certain teachers should also be assessed against other sets of standards published by the Secretary of State that are relevant to them, when available and if appropriate. Teachers, including the Headteacher, who have responsibilities outside the classroom, should also expect to have their performance of those responsibilities observed and assessed.

Performance will always be assessed using professional judgement, taking account of the teacher's context, role and responsibilities.

6.5 Reviewers will assess teachers against the Teachers' Standards in a way that is appropriate to their role, responsibilities and stage of career. Professional judgement will be central to this process, recognising that expectations will differ for teachers at different career stages. In general terms, early career teachers are expected to demonstrate competence against the Teachers' Standards, mid-career teachers confidence and consistency, and more experienced teachers' expertise and sustained impact.

Whilst the Teachers' Standards provide the statutory framework for Performance Development and Review, the process will also recognise wider professional contributions, including collaborative practice, curriculum development, leadership, inclusion and the school's values. Reviewers will consider the teacher's overall professional contribution, taking account of evidence arising naturally from day-to-day practice and the context of the teacher's role and responsibilities.

6.6 The Performance Development and Review process would require the teacher to self-evaluate each of his/ her roles: teacher; form tutor and TLR/Leadership post, if relevant.

6.7 The fundamental purpose of the process is to improve the pupils' learning and outcomes. Therefore, consideration, should be given to what s/he hopes to learn or do differently. When setting the objective, consideration must be given to ensuring it is aspirational yet achievable, and takes into account workload, well-being, and the teacher's personal circumstances including any reasonable adjustments.

Performance Development at The Chantry is centred on improving classroom practice, strengthening professional expertise and ensuring every pupil experiences consistently excellent teaching. It is not intended to create unnecessary evidence gathering or compliance activities.

6.8 The objectives will also take account of the teacher's professional aspirations and any relevant pay progression criteria. They should be such that, if they are achieved, they will contribute to improving the progress of pupils at the school.

6.9 Annually, in September, teachers will evaluate pupils' outcomes alongside curriculum delivery, assessment information and contextual factors to identify strengths, priorities and future improvement providing class by class commentary on their pupils' performance as part of the subject-based self-evaluation process. This will be considered and reflected in Teaching Standards 2 (promoting good outcomes).

6.10 It is important to emphasise that the Performance Development and Review process is an assessment of the overall performance of teachers and Headteacher against the full Teachers' Standards. However, it cannot cover the full range of a teacher's roles/responsibilities. Objectives will, therefore, focus upon the priorities for an individual for the cycle which have been derived from the completion of the preparatory audit against the Teachers' Standards; it follows, then, that meeting the objectives will explicitly help the teacher in meeting the Teachers' Standards.

6.11 At the assessment stage, the reviewer will discuss the teacher's overall performance over the previous year against the Teachers' Standards. The onus will be upon the teacher to demonstrate evidence of their performance as detailed in 6.13 below. There will be particular emphasis upon the individual Standards which link to the teacher's Performance Development objectives. The discussion will give the teacher the opportunity to highlight to the Reviewer his/her particular successes over the past year and lead into the second half of the Review meeting which looks towards setting Performance Development and review objectives for the following year. Performance Development discussions should also provide an opportunity to discuss teacher well-being, and to ensure workload expectations are realistic and sustainable.

6.12 Reviewers should rely on evidence that naturally arises from day-to-day practice, such as lesson observations, standard tracking data, and professional discussions, rather than expecting detailed portfolios or extensive documentation.

Evidence may include professional dialogue, lesson visits, work scrutiny, pupil voice, curriculum planning, assessment information, contributions to wider school life and leadership responsibilities

6.13 The teacher is welcome to provide any other evidence which will exemplify his or her performance against the Teachers' Standards.

6.14 As is made clear in 6.13 above, the professional judgement of reviewers will be central to appraisal against these standards. To that end, the School Leadership Team members who undertake all Performance Development assessments in this school will be well-trained and the consistency of their judgements will be maintained through systematic moderation procedures which will include the moderation of objective setting and judging evidence against the Teachers' Standards, and observation of Performance Development Review conversations.

7 Pay Progression

7.1 Where a teacher is eligible for pay progression, it is expected that recommendations for pay progression should be based on evidence that shows that the teacher is meeting the vast majority of the Teachers' Standards and is at least making good progress towards those not met as stated below in 8.3. In line with national guidance, while performance development reviews may inform pay recommendations, the primary focus of the PDR process is on supporting professional growth and development.

No single piece of evidence or objective will determine a pay recommendation.

7.2 Early Career teachers will progress to M2 after 1 year and will continue to progress from M2 to M3 once they complete their two-year continued training programme, as it will be assumed that they have met the evidence for pay progression as outlined in 6.14 above.

Further details of the decision-making process for pay progression can be found in the school's 2026-27 Pay Policy.

7.3 If appropriate, and as soon as possible, the teacher will receive a written Performance Development and Review report at the end of each Performance Development period – and could comment in writing.

7.4 This review is the endpoint to the annual Performance Review process, but performance and development priorities will be reviewed and addressed on a regular basis throughout the year in interim meetings which will take place during the Spring Term. Where evidence emerges during the Performance Development cycle about the reviewee's performance which causes *some concern*, there should be a review of the reviewee's objectives and the objectives should be prioritised, and amended if necessary, so that any additional objective(s) which are agreed, that address the concerns.

7.5 In order to *support* the teacher whose performance causes *some concern*, an agreed member of staff will work with an SLT member (who is *not* the teacher's Performance Development reviewer) and the teacher to establish more specific areas for improvement. An **Individual Action Plan** (IAP) will be written that includes the areas for improvement, the timeframe and the support that will be offered.

7.6 If, despite the reviewee receiving appropriate and exhaustive support, the reviewee's performance does not improve and goes on to give rise to *significant concerns*, the Performance Development process will cease and the Headteacher will invoke the completely separate Capability Policy and procedure.

7.7 In cases where the teacher's performance has prompted the Headteacher to invoke the Capability Policy and procedure, the Pay Committee will consider use of its discretion not to award progression up the pay range.

7.8 In this school, teachers will receive their written Performance Development reviews by 31 October (31 December for the Headteacher). The Performance Development review will include:

a. Details of the teacher's objectives for the Performance Development period in question.
b. An assessment of the teacher's performance in their role(s) and responsibilities against the Teachers' Standards including their Performance Development Objectives.
c. An assessment of the teacher's training and development needs and identification of any action that should be taken to address them.
d. A space for the teacher's own comments.

7.9 The assessment of performance and of training and development needs will inform the planning process for the following Performance Development period.

8 Reviewing Progress

8.1 The Performance Development cycle includes a review meeting during the Spring Term, providing an opportunity for the reviewee and reviewer to discuss progress towards the Teachers' Standards and the reviewee's professional learning focus. Prior to the meeting, reviewees will receive an outline of the key areas for discussion to support reflection and preparation. Discussions will focus on progress towards agreed objectives, evidence arising naturally from day-to-day practice, consideration of pupil voice where appropriate, professional development, wellbeing and any support required. The reviewer will provide clear feedback on progress towards the Teachers' Standards and the agreed Performance Development objectives, celebrating strengths, identifying next steps and agreeing any adjustments or support where appropriate. Where it is considered beneficial by either the reviewer or reviewee, a further review meeting may be arranged during the Summer Term to discuss progress, provide additional support or review objectives.

8.2 If, at any stage of the Performance Development cycle, the reviewer judges that a teacher is in danger of not meeting the Teachers' Standards, swift remedial action should be taken as outlined in 7.5-7.6 above.

9 Development and Support

9.1 For 2026-2027, The Chantry's CPD programme will be informed by the training and development needs in order to address both national and local agendas with a particular focus on disadvantaged pupils, including PP and SEN, as well as in part, where possible, outcomes agreed at the Performance Development and Review process. The Governing Body will ensure in the budget planning that, as far as possible, resources are made available in the school budget for appropriate training, and support agreed for reviewees, maintaining access on an equitable basis.

Professional development discussions should also consider career aspirations, wellbeing and work-life balance.

9.2 An account of the training and development needs of teachers including the instances where it did not prove possible to provide any reasonably agreed CPD, will form a part of the head teacher's annual report to the Governing Body about the operation of the Performance and Development Review process in the school.

9.3 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 training and support will help the school to achieve its priorities; and
b. the CPD identified is essential for an reviewees to meet their objectives.

9.4 Account will be taken in a review meeting of where it has not been possible for teachers to fully meet their performance criteria because the support recorded in the planning statement has not been provided.

10 Appointment of Reviewers for The Headteacher

Appointment of Governors

10.1 The CEO of the Trust is the reviewer for the Headteacher, alongside two Local Governing Body governors.

10.2 Where the Headteacher is of the opinion that any of the governors appointed by the Governing body is unsuitable for professional reasons, s/he may submit a written request to the Governing Body for that governor to be replaced, stating those reasons.

Appointment of Reviewers for teachers

10.3 The Headteacher Deputy and Assistant Headteachers to undertake all Performance Development reviews for the rest of teaching staff.

10.4 Where a teacher is of the opinion that the person to whom the Headteacher has delegated the reviewer's duties is unsuitable for professional reasons, s/he may submit a written request to the Headteacher for that reviewer to be replaced, stating those reasons.

10.5 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 himself/herself 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.

10.6 A Performance Development cycle will not begin again in the event of the reviewer being changed.

10.7 All line managers to whom the Headteacher has delegated the role of reviewer will receive appropriate preparation and training for that role.

11 Performance Development of Review Cycle

11.1 The Performance Review period will run **for 12 months**, normally from **1st September** to **August 31st. The main review period will be the first half of the autumn term.**

11.2 The process will establish that teachers are meeting all reasonable expectations in respect of their responsibilities. It will involve a three-stage annual review process. Planning and reviews must be completed for all teachers by 31st October and for Headteachers by 31st December.

11.3 The Headteacher will undertake Performance Development reviews for all the School Leadership Team in the third week of September.

11.4 The Headteacher and the Deputy Headteacher will undertake Subject Leader Examination Results Reviews and discuss areas for individual focus.

11.5 The headteacher, deputy headteacher, assistant head and lead teacher will undertake Performance Development for all TLR post holders.

11.6 The headteacher, deputy headteacher, assistant head and lead teachers to undertake all Performance Development reviews for the rest of teaching staff.

11.7 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 this policy. The length of the period will be determined by the duration of their contract.

11.8 Where a teacher starts employment at the school part-way through a Performance Development cycle, the Headteacher, or in the case of the Headteacher, the Governing Body, will determine the length of the first cycle, with a view to bringing it into line with the school's annual cycle as soon as reasonably practicable. Where a teacher transfers to a new post within the school during a cycle, the Headteacher will determine whether the existing cycle should continue or begin again, and whether a change of reviewer is appropriate.

11.9 Where a teacher transfers to a new post within the school part-way through a cycle, the head teacher or, in the case where the employee is the head teacher, the Governing Body shall determine whether the cycle shall begin again and whether to change the appraiser.

12 Teachers Experiencing Difficulties

12.1 When dealing with a teacher experiencing difficulties, the objective is to provide support and guidance through the appraisal process in such a way that the teacher's performance improves and the problem is, therefore, resolved.

12.2 Where it is apparent that a teacher's personal circumstances are leading to difficulties at school, support will be offered as soon as possible, without waiting for the formal annual assessment.

12.3 If, through the Performance Review process or other sources of information (such as parental complaints), it becomes apparent that a teacher is experiencing difficulties which, if unaddressed, could lead to capability procedures, the reviewer, Headteacher, or a member of the leadership team will meet with the teacher as part of the appraisal process. Before any consideration is given to invoking capability procedures, the teacher must be supported through a clearly defined period of informal support—typically lasting a minimum of six weeks—with specific objectives, timelines, and targeted guidance to enable improvement. The head teacher, or a member of the leadership team, will, as part of the appraisal process meet the teacher to:

a. give clear written feedback to the teacher about the nature and seriousness of the concerns;
b. give the teacher the opportunity to comment on and discuss the concerns;
c. give the teacher at least 5 working days' notice that a meeting will be held to discuss targets for improvement alongside a programme of support, and inform the teacher that he/she has the right to be assisted by a representative of an independent trade union or workplace colleague, and at any future meetings where capability will be discussed;
d. in consultation with the teacher at the above meeting, an action plan with support will be established (for example coaching, training, in-class support, mentoring, structured observations, visits to other classes or schools or discussions with advisory teachers), that will help address those specific concerns;
e. make clear how progress will be monitored and when it will be reviewed;
f. explain the implications and process if no – or insufficient – improvement is made.

12.4 The teacher's progress will continue to be monitored as part of the appraisal process and a reasonable time given for the teacher's performance to improve. This will depend upon the circumstances but will be for a period of 6 weeks, with appropriate support as agreed in the Individual Action Plan (IAP), in order that the aim of recovering and improving performance can be achieved. During this monitoring period the teacher will be given regular feedback on progress and arrangements will be made to modify the support programme if appropriate.

12.5 If sufficient progress is made such that the teacher is performing at a level that indicates there is no longer a possibility of capability procedures being invoked the teacher should be informed of this at a formal meeting with the appraiser or head teacher. Following this meeting the appraisal process will continue as normal.

If no, or insufficient, improvement has been made over this period, the teacher will be invited to a transition meeting to determine whether formal capability proceedings need to be commenced or the Performance Development and Review process remains in place. The teacher may be assisted by a trade union representative or work colleague and will have at least 5 working days' notice of the meeting.

13 Appeals

At specified points in the Performance Development and Review process, teachers and Headteachers have a right of appeal against any of the entries in their Performance Development and Review planning records and Review document. Where a reviewee wishes to appeal on the basis of more than one entry, this would constitute one appeal hearing. Details of the appeals process are covered in Section 20 of the school's Pay Policy.

14 Confidentiality

The whole Performance Review process and the Performance Review Planning records, generated under it, in particular, will be treated with strict confidentiality at all times. Only the reviewee's line manager or, where s/he has more than one, each of her/his line managers, will be provided with access to the reviewee's plan recorded in her/his statement, upon request, where this is necessary to enable the line manager to discharge her/his line management responsibilities. Line managers will only be given access to the objectives related to their line management responsibilities. In particular Subject Leaders will have access to all Performance Development objectives of colleagues within their departments so that they will gain an overview of the development priorities of their whole teaching team. Reviewees will be told who has requested and who has been granted access. The Deputy Headteacher, with responsibility for Continuous Professional Development, will have access to all the training needs for all staff identified in the training annex of the reviewees' Planning and Review statements, which are collated from Performance Development Review documents by the PA to the Headteacher.

15 General Principles Underlying this Policy

Disciplinary and Grievance Procedures

The conduct of the formal capability stage will be undertaken in accordance with the provisions of the most recent guidance issued by Worcestershire County Council, which reflects DFE advice. This policy is adopted annually by the Governing Body.

Consistency of Treatment and Fairness

The Governing Body is committed to ensuring consistency of treatment and fairness and will abide by all relevant equality legislation.

Sickness

If long term sickness absence appears to have been triggered by the commencement of monitoring or a formal capability procedure, the case will be dealt with in accordance with the school's absence policy and will normally be referred to the occupational health service to assess the member of staff's health and fitness for continued employment and the appropriateness or otherwise of continuing with monitoring or formal procedures. In some cases, it may be appropriate for formal procedures to continue during a period of sickness absence. However, the views of the occupational health physician will always be taken into account before a decision is reached.

Grievances

Where a member of staff raises a grievance during the appraisal or capability process, the appraisal or capability process may be temporarily suspended in order to deal with the grievance. Where the grievance and appraisal or capability cases are related it may be appropriate to deal with both issues concurrently.

Confidentiality and Professional Relationships

The Performance Development and Review and capability processes will be treated with confidentiality. Only the appraiser's line manager or, where s/he had more than one, each of her/his line managers will be provided with access to the reviewees' plan recorded in her/his statements. This will be done upon request and only where this is necessary to enable the line manager to discharge her/his line management responsibilities. Reviewees will be consulted on requests for access to statements in the context of this policy.

The process of gathering evidence for performance review will not compromise normal professional relationships between teachers. The Governing Body recognises that the reviewer will consult with, and seek to secure the agreement of, the reviewee before seeking information from other colleagues about the work of the reviewee.

However, the desire for confidentiality does not override the need for the head teacher and Governing Body to quality-assure the operation and effectiveness of the appraisal system. The head teacher or appropriate colleague might, for example, review all teachers' objectives and written appraisal records personally – to check consistency of approach and expectation between different appraisers. The head teacher might also wish to be aware of any pay recommendations that have been made.

Monitoring and Evaluation

The Governing Body and head teacher will monitor the operation and effectiveness of the school's appraisal arrangements.

The head teacher will provide the Governing Body with a written report on the operation of the school's/school's Performance Development and Review and Capability policies annually. The report will not identify any individual by name. The report will include an assessment of the impact of these policies on equality. The head teacher will report on whether there have been any appeals or representations on an individual or collective basis on the grounds of alleged discrimination.

Retention

The Governing Body and Headteacher will ensure that all written appraisal records are retained in a secure place in line with the school's retention policy and then destroyed.

16 Equality Impact

The School's responsibilities towards promoting equality, diversity and inclusion have been considered when drafting this policy.

The school will ensure that the implementation of this policy is fair, transparent and free from discrimination. Reasonable adjustments will be made where required for disabled staff and due regard will be given to equality legislation throughout the Performance Development and Review process.

17 Monitoring

This policy will be monitored annually and significant change approved by the Local Governing Body.