

Things To Remember First When Taking Part In Your NEW PERFORMANCE MANAGEMENT Meetings In September.

- 1. Every teacher must TAKE CHARGE of their OWN Performance Management.**
- 2. We must Take Control of the Planning Meeting and have a Dialogue with the reviewer.**
- 3. The sequence is: Job Description-Performance Review-Pay Progression.**
- 4. If we meet our targets at reviews, progression through the pay spine, and once through Threshold, through UPS 2 and 3 SHOULD BE AUTOMATIC.**
- 5. For Performance management purposes, if a target is not in the planning meeting and Agreed, then it does NOT exist for that year.**
- 6. Statutory Guidance says there is ‘An assumption that a teacher/head is meeting the requirements of their job description, the relevant professional duties, and the relevant professional standards.’**
- 7. It also says that P.M. must be, ‘Effective, transparent, fair and applied consistently.’**
- 8. FIVE key areas Must happen:-Planning meeting, Classroom observation, Review and link to pay, Roles and responsibilities, Process and timing.**
- 9. Planning meeting:-Performance criteria have to be specified At The Outset.**
- 10. Classroom observation:-THREE hours Maximum; appropriate, proportionate and focused. It is not necessary to have 3 hours, 1 hour could be appropriate and proportionate. Part time teachers:-50% =1 ½ hrs.obs.**
- 11. OTHER observations:-the three hours are MULTI-PURPOSE, for all other jobs in school, eg. Department obs., Heads’ 10 mins. ‘drop ins.’, peer working/ obs., working with ASTs etc. NB take charge of ‘drop-ins’, ‘Hello, would you like to talk to.....?’ Or ‘Please work with.....’**
- 12. OFSTED obs. ARE outside the 3 hours.**
- 13. Additional School Reviews:-If the Head calls the County in for this, NO EXTRA observations outside the 3 hours. If County uses ‘our statutory powers of intervention because we are concerned’, then they can use extra observations but written feed-back MUST be given to the teacher. If it is not given, the teacher must remind the person concerned in writing, keeping a copy for their own records.**
- 14. If a Head says they wish to observe a teacher more because they ‘have concerns’ about that teacher, then Performance Management must STOP and Competency Procedures must start. Remember, there is an Informal stage to the Formal Competency (Capability) Procedures. It is there to give support to a teacher with difficulties.**
- 15. In the Performance Management cycle the Teacher takes the lead in the planning, any support, training and development agreed should have the provision available. (It is the Head’s role to have planned and budgeted**

for this in the School Development plan) Monitoring and Support should continue at 3 months, 6 months and 9 months, especially provision of agreed training and support and there should be NO SURPRISES at the final review meeting.

16. If money is not available for a target, then the target can not happen!
17. The teacher must know what is expected of them.
18. The Planning meeting should consider the reviewee's objectives, arrangements for classroom observations, other evidence to be taken into account to assess reviewee's performance, performance criteria, support needed, timescales for achievement, training and development needs and reviewee's work-life balance.
19. Criteria, Avoid % targets and other numerical targets, there are too many other variables. A range, eg, 66% to 86% could be acceptable, or quartile ranges.
20. At least one target should be for the reviewee's benefit, their professional aspirations.
21. Remember, the planning meeting must not be in lunch time or PPA time. It must be 1 hour, so cannot be after school unless it was placed in the school's Calendar of Directed Time for the Year, given preferably in the July.
22. Although there can be more than 3 targets, the number should be fair and balanced throughout the school, reasonable and manageable.
23. Remember, there are no EXTRA targets for UPS 2 and UPS 3, just 'sustained and continued' not 'increased'.
24. Evidence:-can include letters from parents, 'Thank you for teaching to
25. Remember, nothing a Head sees in a 'drop-in' can be used in your performance management but they can call in inter-review meeting to discuss a new focus for any future planned observation.
26. If you are off sick or move schools during a P. M. cycle, you should ask for an inter-review meeting to discuss any concerns.
27. Remember, only teachers with a TLR or Leadership Spine responsibility can be Performance Management Reviewers.
28. Academies and Performance Management:-most have accepted the Blue Book (teachers' pay and conditions) so we would expect compliance with PM but cannot be enforced.
29. Protocol for observations, feed-back etc., best to use County model, Union Reps. in schools should be part of the discussion team. OFSTED Forms SHOULD NOT BE USED. It is NOT one of their requirements.
30. Performance management is Not about good or bad, it is a judgement on meeting or not meeting targets!
31. Timescale:- All teachers' Performance management annual cycle must be completed by 31st October. (Heads by 31st December). If the Head is the reviewer, there are 10 working days between planning meeting and signed statements. If someone else is, the Head must review the statement within 10 working days. The teacher can appeal at this stage unless the

Head asks for changes to be made. If changes are to be made there are 10 working days for that to happen and a final agreed statement to be signed off, unless the reviewee appeals at this final stage.

32. Remember, Continuous Professional Development is an entitlement for all staff.

Good Luck.

Sue Burgess. June 2007.