

Performance Management for Teachers – Reviewers’ Good Practice Guide

This Reviewers’ Good Practice Guide has been compiled by the Innovation for Learning team working in conjunction with colleagues in several LAs.

It is intended to support the PM Reviewer development briefings currently being rolled out across the LA.

If you require any further information in relation to this area please contact:-

Peter Steadman or Anna Turner (01226) 281961

**Children, Young People & Families
Directorate**

Innovation for Learning and Care

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BARNSELY
Metropolitan Borough Council

Introduction

This reviewer's good practice guide draws upon work by colleagues from several local authorities –and in particular that of Liz Buxton of Rotherham MBC. Extensive research has been undertaken by **Peter Coverdale (Education Leeds)**, **Mike Morgan (Doncaster MBC)** and **Peter Steadman (Barnsley MBC)** (Regional Trainers for the TDA Y&H) into the kind of information and guidance needed by those designated as Reviewers that could assist colleagues across the Yorkshire and Humberside region.

This guidance does not have the authority of any national guidance agreed with our social partners. However, it is designed to assist schools, managers and reviewers in engendering effective performance management practice based on what is already in operation around the region/country today.

To support this good practice guide, a PM Reviewer Development pack has also been compiled, again with acknowledgements to several local authorities, to assist individual LAs in their roll out of Reviewer Development sessions.

We hope you find these resources useful and we would welcome any comments/suggested revisions for future updates.

Regards

Peter Coverdale
Mike Morgan
Peter Steadman

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Leicestershire County Council
Rotherham MBC
Wakefield MBC

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Preparing for the Review Meeting

Review meetings cannot take place in lunch breaks, PPA time etc. and must be within directed time. Reviewers will want to be well prepared for the review meeting, and may find it helpful to:

For the review of the last cycle:

- Check the last planning and review statement, all the evidence which has been collected as part of the monitoring process, written feedback on agreed classroom observations, contributions from relevant internal and external contacts with direct professional knowledge of the reviewee.
- Check that all documents to which they will refer at the meeting have been shared with the reviewee, to assist their preparation for it.

In preparing for the next cycle:

- Consider the improvement objectives of the school and the relevant key stage or curriculum area(s) and how these may be relevant to planning with the reviewee. For example, the school may have agreed a shared development objective covering all teachers, including the head teacher.
- Ensure they are familiar with the standards which form the backdrop to the reviewee's current post and those appropriate to the reviewee's next career stage, and the relevant criteria for pay progression set out in the School Teachers' Pay and Conditions Document.
- Ensure they have consulted with relevant third parties with direct professional knowledge of the reviewee, about possible objectives for the next review cycle, performance criteria, evidence, arrangements for collecting it and support to be provided to the teacher.

Roles and responsibilities – Reviewer and Reviewee

	Reviewee	Reviewer
Before the meeting	<ul style="list-style-type: none"> • Carry out a self-review reflecting on: <ul style="list-style-type: none"> - achievements - progress towards objectives - impact of training and development on performance • Think about possible future objectives and training and development needs • Collate evidence as agreed at the planning meeting 	<ul style="list-style-type: none"> • Consult the job description of the reviewee • Consult Professional Standards Framework for Teachers • Consult previous review records (where applicable) • Ensure a sound knowledge of the role and work of the reviewee • Gather and review appropriate evidence and ensure that all evidence has been shared with the reviewee prior to the meeting • Agree a mutually convenient time and place
During the meeting	<ul style="list-style-type: none"> • To discuss your work over the last review period • To discuss your progress towards your objectives • To identify any factors which have an impact on your effectiveness • To discuss and plan future objectives • Discuss and agree the support, training and development needed to meet objectives. • Discuss performance criteria which will be used to assess performance 	<ul style="list-style-type: none"> • Understand the wider perspective of the priorities and developments in the school • Agree objectives and classroom observations • Agree performance criteria and other evidence which will be used to assess progress and overall performance • Agree provision of support. Professional learning and development activities over the PM cycle • Keep an accurate record of the discussion in order to complete relevant documentation • Agree a recommendation on pay to eligible teachers
After the meeting	<ul style="list-style-type: none"> • Develop skills and practice related to the objectives • Participate in interim discussions to review progress. <p>Ensure reviewers are made aware of any concerns at the time they arise about progress or provision of support or training</p>	<ul style="list-style-type: none"> • Prepare and write the planning and review statement • Copy to reviewee within 5 days • Copy to Head within 10 days • Copy of training and development annex to LfPL • Monitor and review progress towards the agreed objectives and support development of skills and practice <p>Ensure provision of planned support and development.</p>

The Performance Management Cycle

<p>P L A N N I N G</p>	<p><i>Key functions of the planning meeting</i></p> <ul style="list-style-type: none">• To agree and set objectives.• To agree classroom observations and any other evidence which will be taken into account, when assessing overall performance.• Agree the performance criteria for each objective• To determine the level of support that will be provided to enable the reviewee to meet the performance criteria.• To agree the timescales for achieving the objectives• To determine the reviewee's training and development needs and the actions that will be taken to address them.	<p><i>Guidance</i></p> <p>There is no specified number or type of objective, but they must focus on priorities for the individual and contribute to the relevant whole school/team/department objectives. Objectives, if achieved, should contribute to improving the progress of pupils.</p> <p>Objectives should be set in the context of:</p> <ul style="list-style-type: none">• the relevant professional standards• the reviewee's job description• any pay progression criteria where the reviewee is eligible• the need to achieve a satisfactory work life balance• the relevant whole school / team priorities and objectives <p>Reviewers must:</p> <ul style="list-style-type: none">• have regard to the reviewee's professional aspirations when determining objectives.• Identify the support that will be provided to the reviewee to help him/her meet the performance criteria.• Identify the development needs and the actions required to address them (within schools Professional Learning Policy) <p>All objectives should be challenging and SMART:</p> <ul style="list-style-type: none">• Specificis it clear exactly what you want to achieve?• Measurable.....is it clear what results and impact it will have?• Achievable.....are you able to meet the objective?• Realistic.....have you identified the support you will need?• Timeboundis there a clear date for completion?
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MONITORING

Key functions of monitoring

- To check on overall performance against the job description and relevant professional standards.
- To check on progress against the agreed objectives
- To ensure that development and support opportunities necessary to meet the performance criteria is provided
- To discuss any issues arising during the year
- To collect evidence in support of the assessment, which may form part of a 'Professional Development Portfolio'

Guidance

The reviewer may monitor the reviewee's performance through different methods including:

- classroom observations (following an agreed protocol)
- task observations
- work scrutiny
- discussions with the reviewee /discussions with colleagues.

Evidence from monitoring should always be shared with the reviewee during the year, so that there are 'no surprises' at the end of the cycle – the **ongoing professional dialogue**

Classroom observations (extent/pattern and focus)

Arrangements for classroom observations and the focus for each observation should be agreed during the planning meeting. There should always be a clear rationale and focus for any classroom observation, which should be supportive and developmental.

- 3 hours maximum for the purposes of performance management (see school policy/protocol)
- does not include the Headteacher monitoring the quality of T&L/Ofsted/SIPs
- feedback on lesson observations should be given verbally no later than the end of the next school day and in writing within 5 days
- PPA time cannot be used for feedback

If **concerns** emerge about a reviewee's performance, extra observations can be arranged over and above the three hour limit. To do this the reviewer shall ensure a **revision meeting** is arranged. Details of any changes to the planning statement should be inserted into an **addendum** to the planning statement.

Plans must be formally revised if :

- circumstances change/the reviewee's responsibilities change
- evidence emerges which gives rise to concern about the reviewees performance
- if the reviewee is absent for a long time and the statement is no longer relevant

R E V I E W I N G

Key functions of the review meeting

- To determine whether the objectives and performance criteria agreed in the planning statement have been met
- To discuss the impact of the support, training and development undertaken
- To identify areas of improved performance and celebrate successes
- To discuss and assess overall performance
- Make recommendations on pay to eligible teachers

Guidance

During the Review Meeting reference should be made to:

- the reviewee's job description
- the Professional Standards Framework for Teachers
- the record of the Planning Meeting
- any monitoring evidence gathered during the cycle

Before the Planning / Review Meeting the reviewee will be asked to reflect upon and review:

- achievements over the year including progress towards objectives
- any difficulties experienced or objectives not met
- impact of training and development undertaken

The reviewee may also bring any other relevant evidence to the meeting to evidence their performance over the year. e.g. pupil data, training and development record, lesson planning

Recommendations on Pay

In relation to the revised regulations – eligible teachers are those teachers progressing from **Upper Pay Spine (UPS) 1 to UPS 2 and UPS 2 to UPS 3.**

Progression through the main pay scale and applications to progress through the Threshold remain unaffected by these regulations and current arrangements will continue.

Where Fast Track or 'Double Jumping' applies then reference needs to be made to school pay policy

Teachers on Leadership/AST scale are also eligible for pay recommendations

Professional Development Opportunities for Teachers

Work based Development Activities

Work based development can be highly effective, often more so than external training courses. Below is a list of some appropriate work-based activities:

- Observing/shadowing colleagues or other good practitioners
- Visiting other schools / Secondment
- Being observed by a colleague and receiving feedback
- Rotation of roles / job swap
- Attending staff / departmental meetings or training
- Carrying out action-based research in the classroom / school e.g. via the GTC Teacher Learning Academy
- Contributing to working party / action team /school change team
- Teachers TV
- Acting as a reviewer
- Acting up / deputising - Supervising other members of staff
- Team teaching / team working
- Reading or internet based research
- Qualification / course
- Leading a school based project
- Coaching and /or Mentoring other teachers or support staff
- Taking a key role in the provision of some extended service e.g, providing a programme of after school activities

PLANNING AND REVIEW MEETING – AGENDA

<p>Current role Confirm the job description reflects the key responsibilities of the reviewee and is still relevant.</p>	<p>Possible questions</p> <ul style="list-style-type: none"> • Have your responsibilities changed in the last year? • Have you taken on new roles and responsibilities which are not covered in your current job description? • Which aspects of your work do you enjoy?
<p>Review and evaluation of the past year Review overall performance against job description and professional standards</p> <p>Review and evaluation of outcomes, successes and achievements of the last review period.</p> <p>Review:</p> <ul style="list-style-type: none"> • Whether objectives have been achieved and the impact this has had on pupil progress. • Whether support / learning and development has been effective and the impact this has had on practice. • Recommendation on pay to eligible teachers 	<ul style="list-style-type: none"> • What have you achieved over the last year that you are particularly proud of? • To what extent have your objectives been achieved? • What skills, knowledge, strengths have helped you achieve your objectives? • How do you think this has benefited the pupils and the school? • What evidence is there to support these judgements? • Are there ways in which you could be using your skills and knowledge more effectively? • Has anything been difficult or disappointing for you this year? What caused these difficulties/disappointments? • How helpful was the support and professional learning you received?
<p>Planning for the year ahead Discuss possible areas for improvement and set objectives</p>	<ul style="list-style-type: none"> • What do you want to achieve in the next year? • Are there any aspects of your work you would like to improve or develop?
<p>Support and development Agree a development plan including relevant development activities.</p>	<ul style="list-style-type: none"> • What knowledge and skills do you need to gain? • How will this be useful to you in your work? <p>What support / professional learning would help you achieve your objectives?</p>

PLANNING AND REVIEW MEETING - RECORD

Areas for discussion	Notes
<p>Current role Confirm the job description reflects the key responsibilities of the reviewee and is still relevant.</p>	
<p>Review and evaluation of the past year Review and evaluation of outcomes, successes and achievements of the last review period.</p> <p>Review overall performance against job description and professional standards</p> <p>Review:</p> <ul style="list-style-type: none"> • Whether objectives have been achieved and the impact this has had on pupil progress. • Whether support / learning and development has been effective and the impact this has had on practice. • Recommendation on pay for eligible teachers 	
<p>Planning for the year ahead Discuss possible areas for improvement and set objectives</p>	
<p>Support/training/development</p> <p>Agree a development plan including relevant development activities.</p>	

SELF REVIEW (Reviewee)

What do you feel your successes have been over the past year in relation to:	Notes
<p>Pupil progress?</p> <ul style="list-style-type: none"> • pupil behaviour / attitude • pupil attendance • pupil contributions 	
<p>Curriculum development?</p> <ul style="list-style-type: none"> • developed / improved resources • Increased personal knowledge • Use of assessment procedures • Use of ICT skills • Contribution to wider curriculum e.g. sports clubs 	
<p>Support for wider aspects of school life?</p> <ul style="list-style-type: none"> • More efficient systems introduced • Contributed to policy development • Member of a project group? 	
<p>Support for other staff/ team members?</p> <ul style="list-style-type: none"> • Shared new knowledge or skills • Built relationships • Mentored a colleagues 	

SELF REVIEW (Reviewee)

What learning or development opportunities have you experienced over the year?	Notes
<ul style="list-style-type: none"> • Professional Learning courses/networks/events • shadowing colleagues, • peer reviews, • learning from observation, • reading / internet research 	
<p>How has this impacted on the way you work or what you have achieved in relation to:</p>	
<p>The pupils?</p> <ul style="list-style-type: none"> • pupil progress • pupil behaviour / attitude • pupil attendance • pupil contributions 	
<p>The curriculum?</p> <ul style="list-style-type: none"> • developed / improved resources • Increased personal knowledge • Use of assessment procedures • Use of ICT skills • Contribution to wider curriculum e.g. out of school clubs 	
<p>The school?</p> <ul style="list-style-type: none"> • More efficient systems introduced • Contributed to policy development • Member of a project group? 	
<p>The team?</p> <ul style="list-style-type: none"> • Shared new knowledge or skills • Built relationships 	

SELF REVIEW (Reviewee)

What areas do you feel you need to focus on in the coming year (and what support/professional learning do you need) in relation to:

Pupils?

Curriculum?

School?

Team?

Personal development?

PLANNING AND REVIEW MEETING - REVIEWER'S PROMPT SHEET

	Notes
<ul style="list-style-type: none"> • How have you successfully used your skills/knowledge over the year? e.g. <ul style="list-style-type: none"> - ICT or using new technology or materials - Completed a Teacher Learning Academy project and achieved recognition with the GTC. - Developed a specific aspect of classroom practice - Lead a school based project 	
<ul style="list-style-type: none"> • What development opportunities have you undertaken? • Have you learned from anyone else or worked in collaboration with colleagues on a project? • How have you used this learning in your work? • What evidence have you got that it has made you more effective? e.g. <ul style="list-style-type: none"> - observations / feedback - self confidence - working more efficiently 	
<ul style="list-style-type: none"> • Have you done anything else to contribute to the success of the school? e.g. <ul style="list-style-type: none"> - served on a working party - mentored new staff - helped in out of school activities / organised social events - supported the development of colleagues 	
<ul style="list-style-type: none"> • What do you feel that you have contributed to your team? e.g. <ul style="list-style-type: none"> - strengths and skills - knowledge, experience, attitudes 	

PLANNING AND REVIEW STATEMENT FOR YEAR 20__ / 20__

Name of Reviewee	
Name of Reviewer	
Date of review	

Objective	Performance criteria & timescale	Support, training & development or other actions needed	Monitoring	Progress at year end (objective met / not met/ ongoing)

Assessment of overall performance

Recommendation for pay progression (where reviewee is eligible)

Career aspirations

Signed

Date

Reviewer

Reviewee

Headteacher

PROFESSIONAL DEVELOPMENT PLAN

Professional Learning and Development Plan

Reviewee	
Reviewer	

Date	Identified professional learning & development need	Intended outcome and timescale	Preferred development activity	Evaluation of impact