



## **Rawdah Montessori Primary School Staff Performance Management Policy**

**Version:** 1.1

**Reviewed:** October 2025

**Next Review Due:** October 2026

### **1. Introduction**

Rawdah Montessori Primary School is committed to providing the highest quality of education and care for our pupils. We recognise that this is achieved through the dedication, professionalism, and continuous development of our staff.

This policy sets out the framework for managing staff performance in a supportive, fair, and transparent manner. Its purpose is to encourage professional growth, recognise good practice, and provide clear guidance and support where improvement is needed.

This policy should be read in conjunction with the:

- **Staff Code of Conduct**
- **Capability Procedure** (for formal underperformance)
- **Disciplinary Policy**
- **Grievance Policy**
- **Staff Attendance and Absence Management Policy**

- **CPD Policy**

## **2. Purpose and Aims**

The purpose of this policy is to:

- Promote a culture of continuous improvement and professional growth.
- Ensure that all staff understand their roles, responsibilities, and the standards expected of them.
- Recognise and celebrate good performance.
- Identify areas where support or development is required.
- Address underperformance promptly, fairly, and constructively.
- Ensure that the school's performance standards align with its vision, values, and safeguarding responsibilities.

## **3. Scope**

This policy applies to all staff employed by the school, including:

- Teaching and support staff
- Part-time and full-time employees
- Permanent, fixed-term, and temporary staff

It does not apply to:

- Volunteers or governors (who are covered by separate arrangements)
- Contractors or agency staff (who are managed by their own organisations)

New staff are subject to a **probationary period** (usually 6 months), during which performance is reviewed more frequently. Probation is covered by a separate **Probation Policy**.

## 4. Key Principles

Principle	Explanation
<b>Supportive, not Punitive</b>	Performance management is a developmental process, not a disciplinary one.
<b>Fair and Transparent</b>	Objectives, expectations, and review processes will be clear and applied consistently.
<b>Evidence-Based</b>	Judgements about performance will be based on a range of evidence, not just one observation.
<b>Collaborative</b>	Staff will be actively involved in setting objectives and identifying development needs.

Principle	Explanation
<b>Confidential</b>	All performance management discussions and records will be treated confidentially.

## 5. Roles and Responsibilities

Role	Responsibilities
<b>Governing Body</b>	Ensure the policy is in place and effective; monitor its implementation; receive anonymised reports on outcomes.
<b>Headteacher</b>	Overall responsibility for implementing this policy; oversee performance management across all staff; provide guidance and training for appraisers; make final decisions in cases of persistent underperformance (in consultation with HR/governors).
<b>Appraisers (Line Managers)</b>	Conduct performance reviews; set objectives with staff; provide constructive feedback; identify development needs; maintain accurate records.

Role	Responsibilities
<b>All Staff</b>	Take responsibility for their own performance and development; engage positively with appraisal processes; identify training needs; work collaboratively to support school improvement.
<b>HR Lead (if applicable)</b>	Advise on process; ensure consistency; maintain training records.

## 6. The Performance Management Cycle

Performance management is an ongoing process, not a one-off event. The annual cycle consists of four key stages:

### 6.1 Stage 1: Objective Setting (Autumn Term)

At the beginning of the academic year, each staff member will meet with their appraiser to agree on **3–5 objectives** for the year ahead. Objectives should be **SMART**:

Criterion	Explanation	Example (Teacher)	Example (Teaching Assistant)
<b>Specific</b>	Clear and focused	"Improve pupil engagement during literacy lessons."	"Support small-group phonics sessions more effectively."
<b>Measurable</b>	Can be tracked	"85% of pupils to achieve expected standard in writing."	"Receive positive feedback from class teacher on support."
<b>Achievable</b>	Realistic given role and resources	"Implement one new Montessori practical life activity per term."	"Complete Level 2 Teaching Assistant qualification."
<b>Relevant</b>	Linked to school priorities	"Align with school focus on early reading."	"Support school's behaviour policy in line with training."
<b>Time-bound</b>	Clear deadline	"By end of Summer Term."	"By end of Spring Term."

Objectives should be recorded on a **Performance Management Plan** form and signed by both parties.

## 6.2 Stage 2: Mid-Year Review (Spring Term)

A formal review meeting is held to discuss progress against objectives. This is an opportunity to:

- Celebrate achievements and progress.
- Identify any barriers or challenges.

- Discuss any support or resources needed.
- Adjust objectives if circumstances have changed (e.g., new role, unexpected challenges).

No formal grading is given at this stage. Notes of the meeting are kept, but this is a developmental conversation.

### **6.3 Stage 3: End-of-Year Review (Summer Term)**

At the end of the academic year, a formal review meeting is held to assess overall performance against the agreed objectives.

#### **Evidence may include:**

- Lesson observations (formal and informal)
- Learning walks and book scrutiny
- Pupil progress data
- Feedback from colleagues, parents, or pupils (where appropriate)
- Self-assessment against objectives
- Records of CPD undertaken

Following the meeting, the appraiser will produce a written **End-of-Year Review** report, which will:

- Summarise performance against each objective.
- Identify strengths and areas for development.
- Recommend a professional development plan for the coming year.
- Be signed by both parties.

## **6.4 Stage 4: Professional Development Plan**

Development needs identified during the review feed into the school's **Continuing Professional Development (CPD)** programme. This may include:

- In-house training or workshops
- External courses or qualifications
- Coaching or mentoring
- Peer observation
- Attendance at network events

A record of CPD undertaken is kept in the staff member's personnel file.

## **7. Support and Development for Good Performance**

Where staff are performing well, the school will:

- Recognise and celebrate their contribution (e.g., through verbal feedback, thank you cards, public acknowledgment).
- Provide opportunities for career progression and leadership development.
- Offer access to advanced CPD and training.
- Consider them for additional responsibilities or promotion when vacancies arise.

## **8. Addressing Underperformance (Informal Stage)**

If a concern about performance arises, it will be addressed promptly and supportively. The aim is always to help the staff member improve.

### **8.1 Informal Discussion**

The line manager will meet with the staff member to:

- Clearly explain the concern.
- Listen to the staff member's perspective.
- Identify any barriers or support needs.
- Agree on actions to address the concern.

This is not a formal meeting, but a brief note of the discussion and agreed actions may be kept.

### **8.2 Support Measures**

Depending on the nature of the concern, the following support may be offered:

- Additional coaching or mentoring
- Targeted training or refresher courses
- Increased observations with feedback
- Adjustments to workload or role expectations
- Regular check-ins to monitor progress

## **8.3 Monitoring**

Progress will be reviewed over an agreed period (usually 4–8 weeks). If satisfactory improvement is achieved, the matter is resolved and normal performance management continues.

## **9. Formal Capability Procedure**

If performance does not improve following informal support, or if the underperformance is more serious, the matter will be referred to the **Capability Procedure** (a separate policy).

The Capability Procedure is a formal process that may lead to dismissal if improvement is not achieved. It includes:

1. **Formal Meeting:** The staff member is invited to a formal meeting to discuss concerns. They have the right to be accompanied. A **Performance Improvement Plan (PIP)** is established with clear targets, support, and review dates.
2. **Monitoring Period:** Progress is reviewed regularly (usually over 6–12 weeks). Written feedback is provided after each review.
3. **Review Meeting:** At the end of the monitoring period, a review meeting is held to assess whether sufficient improvement has been made.
4. **Outcome:** If satisfactory improvement is achieved, the process returns to normal performance management. If insufficient improvement is made, further action may be taken, up to and including dismissal.

**Note:** The Capability Procedure is separate from the **Disciplinary Policy**, which deals with misconduct rather than capability.

## **9. Probationary Period**

New staff are subject to a **probationary period** of **3-6 months** (extendable in exceptional circumstances). During probation:

- Performance is reviewed more frequently (usually at 1 month, 3 months, and 5 months).
- Objectives are set and monitored closely.
- The line manager provides regular feedback and support.
- At the end of probation, a decision is made on whether to confirm the appointment, extend probation, or terminate employment.

Probation is managed under a separate **Probation Policy**, but the principles of this policy apply.

## **10. Record Keeping**

- All performance management records (objectives, review notes, end-of-year reports) will be kept securely in the staff member's personnel file.
- Records are confidential and access is restricted to the staff member, their appraiser, the Headteacher, and HR (where applicable).
- Records will be retained in line with the school's **Data Retention Schedule** and **Data Protection Policy**.

## **11. Appeals**

Staff have the right to appeal against any formal decision made under this policy if they believe it has been applied unfairly.

### **11.1 Grounds for Appeal**

Appeals will only be considered on the following grounds:

- A procedural irregularity occurred that affected the fairness of the process.
- New evidence has come to light that was not reasonably available at the time.
- The decision was unreasonable given the evidence.

### **11.2 Appeal Process**

1. Submit a written appeal to the **Headteacher** (or **Chair of Governors**) if the appeal concerns the Headteacher) within **10 working days** of receiving the decision.
2. The appeal will be heard by a manager or panel not previously involved in the case (e.g., a governor or external advisor).
3. The appellant has the right to be accompanied by a fellow employee or trade union representative.
4. A written outcome will be provided within **10 working days** of the appeal hearing.

The appeal decision is final.

## **12. Monitoring and Review**

This policy will be reviewed **every two years** by the Governing Body, or sooner if:

- There is a significant change in legislation or statutory guidance.
- The school identifies a need for improvement based on feedback or outcomes.
- A recommendation is made by an external review or inspection.

The Headteacher will provide an anonymised annual report to the Governing Body on the operation of the policy, including any trends or areas for development.

## **Staff Acknowledgment**

All staff are required to read this policy and sign the acknowledgment below. The signed form will be kept in the staff member's personnel file.

I confirm that I have read, understood, and agree to abide by the **Rawdah Montessori Primary School Staff Performance Management Policy**.

**Name:**

**Role:**

**Signature:**

**Date:**

## **Review of Policy Dates**

REVIEW DATE	REVIEWED BY	SIGNED OFF (Name & Role)
<b>Oct 2025</b>	Governing Body	<b>Chair:</b> Sohaib Tanvir
<b>Next Review Due:</b>		
<b>Oct 2026</b>	Governing Body	<b>Chair:</b>
	Headteacher	<b>Headteacher:</b>