

Headteacher Performance Management

Guidance for the appointed governor

What is performance management?

Performance management is a confidential, supportive and developmental process designed to ensure that the headteacher has the skills and support needed to conduct their role effectively. The process should also ensure that the headteacher is able to continually improve and develop their professional practice.

The legislation covering performance management in maintained schools does not apply in Trust, however the Trust's policy and procedure is broadly the same.

Who participates in the performance management process?

The Trust Board delegates headteacher performance management to the Deputy CEO who line manages the Headteachers in the Trust. The scheme of delegation, also identifies that a governor, appointed by the local governing board, should be included in the process. This is likely to be, although not always, the Chair of Governors – this is the decision of the local governing board.

A summary of the process

The performance management review of headteachers previous year's objectives and setting of targets for the current year should be completed by 31 December. The Trust endeavours to try to complete headteachers reviews by 31st October. This is to enable any whole school objectives that are set to be reflected in the objectives for other staff in the school.

During the year, usually in February or March, at least one other review meeting is held and recorded on the Review and Target Setting Template. It will be decided at the target setting meeting who will be responsible for undertaking this review.

The annual performance management meeting will have two parts. The first part of the meeting will be a review of the previous year's targets and the overall performance of the school and the headteacher. The headteacher should have evidence available to demonstrate that they have met the previous year's targets and objectives.

This information may include the following:

- Their job description
- A copy of agreed performance management targets
- The SDP
- The school self-evaluation document
- Copies of any notes of visit from the school effectiveness team
- Pupils' outcome data

- The school's most recent Ofsted or SIAMS (Statutory Inspection of Anglican and Methodist Schools) report, if applicable to the performance management cycle

The DCEO, assisted by the appointed governor, will use their knowledge and judgement of the school's performance and the specific evidence provided by the headteacher to decide whether their objectives have been met. If objectives have not been met, or are only partially met, the DCEO and the appointed governor should seek to clearly understand the reasons for this and decide whether any mitigating circumstances or challenges are valid.

The second part of the meeting will be setting the objectives for the coming year. The objectives will consider areas of improvement set out in the school's development plan and will also take account of any Trust-wide improvement areas that are relevant to the school.

The flow chart at Appendix 1 sets out the full process and timeline.

Reviewing Objectives

During the meeting, the objectives set in the previous year are reviewed. Headteacher pay progression is not linked to the performance management cycle.

Reporting to the local governing board

The appointed governor will inform the local governing board that the appraisal cycle has been completed. This should be planned as an agenda item for the next full local governing board meeting, following the performance management meeting, so the completed process can be recorded in the minutes. The headteacher's objectives are confidential to the appointed governor, the DCEO and the headteacher – these should not be reported to the governing board.

Setting objectives

It is usual that three objectives are set for the year ahead, and any training and development needs for the headteacher are determined and recorded as part of the process. One of the objectives should specifically relate to training and development for the headteacher or relate to their mental health and wellbeing or work life balance.

If after reading this guidance and you have any questions, please contact the DCEO or COO.

Please note: Appendices are on the following pages.

Appendix 1 - Outline of the process for Headteacher Performance Management

DCEO/REL arranges a Sept/Oct date with the headteacher for the annual performance management. This will usually be at the last HT Day of the preceding year.

The headteacher ensures that this date is shared and agreed with the appointed governor from the Local Governing Board.

Five days ahead of the meeting the DCEO/REL will send the previous year's PM information, a copy of the policy, and the headteachers' standards to the headteacher. The headteacher will ensure that the appointed governor has copies of these documents ahead of the meeting.

The headteacher self-evaluates against the previous year's objectives and collates the evidence of their impact, in readiness for the meeting.

The DCEO/REL meets with the headteacher 1:1 to review the evidence and proposed objectives for the coming year. The meeting is approximately 45 - 60 minutes.

Immediately following this the DCEO/REL meets with headteacher and appointed governor to review and celebrate the previous year's successes, acknowledge any frustrations, and set new objectives for the coming year. The DCEO/REL will identify with the headteacher what additional support and/or continuing professional development and learning is required to enable these objectives to be met. The headteacher's workload and wellbeing will be discussed during this conversation. Arrangements for monitoring the progress of the objectives are agreed. The evidence to be collected is recorded on the PM form.

Mid-year review arrangements are agreed at the target setting meeting.

The DCEO/REL writes up the headteacher's PM and ensures that this is returned to the headteacher in draft within five working days to ensure that they are content with the objectives for the year ahead.

The headteacher reviews and confirms the PM document with the DCEO/REL and returns it via email within five working days. The DCEO/REL then returns the finished version of the document to the headteacher within a further five working days. The headteacher shares this completed document with the appointed governor within five working days. If the REL has led the headteachers review, they will send the completed document to the DCEO within 5 days of completion. The DCEO will securely store an electronic version.

The appointed individual meets with the headteacher in February/March to review progress. The DCEO/REL will be informed this mid-year review has been completed.