Mid Essex Anglican Academy Trust

To unlock every child's potential as a unique child of God

Respect – Forgiveness – Trust – Responsibility – Thankfulness – Justice – Humility

PERFORMANCE MANAGEMENT POLICY

The Policy was formally adopted by the Trustees on:	Date: 14th May 2026

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1. Introduction

The day-to-day performance of staff is monitored, managed and supported by line managers. The performance management procedure sets out the framework for a clear, fair and consistent assessment of the overall performance of staff. The process will be supportive and developmental, to ensure that all staff have the skills and support they need to carry out their role effectively and to enable them to continue to improve their professional practice within the context of the improvement plan and the standards expected of staff by relevant national and local standards and job and person specifications. Performance Management will also be the key process in determining annual performance pay progression.

2. Scope

This Procedure is applicable to all trust employees including those employed to work in individual academies within the Trust and to staff who are employed to work centrally and/or support several or all Trust academies.

In the case of:

- staff with less than one year's service/on fixed term contracts - the cycle will be adjusted according to the start/duration of the contract;
- those undergoing a probationary or statutory induction period – the performance management procedure will not normally apply until this period has been successfully completed other than in exceptional circumstances.

3. Roles and Responsibilities

3.1 Performance management reviewers

- The Trust Board will appoint a Trustee(s) to manage the CEO and headteacher's performance management.
- The headteacher will appoint performance management reviewers for other staff within the Trust.

The role of the performance management reviewer is to operate the Performance Management Policy in its entirety. The reviewer/headteacher will be responsible for making recommendations on pay progression on the performance management statement in accordance with the Pay Policy.

3.2 It is the responsibility of the Trust Board to:

- define, communicate and monitor procedures and to ensure that they are applied in a fair and consistent manner;
- appoint an external advisor to support them in undertaking the CEO's appraisal (if using)
- ensure that systems are in place for the proper induction of new and promoted staff, and for day-to-day management, support and development of staff.

3.3 It is the responsibility of the CEO, headteacher and other managers to:

- manage performance effectively ensuring that staff are aware of the standards expected of them and dealing with any minor deficiencies at the earliest stage through normal day to day supervision and probation and induction procedures.

3.4 It is the responsibility of all staff to:

- be aware of and comply with the specific standards of performance related to their area of work and workplace;
- comply fully with this procedure and to co-operate with the processes contained therein.

The performance management process will be operated in a way which minimises the additional workload on all parties.

Note 1: In the event of a familial or personal relationship between the employee and the line manager, an appropriate more senior replacement will manage the procedure and make initial decisions.

Note 2: Persons with familial or personal relationships will not sit on review panels.

*A "personal relationship" is defined as a relationship between individuals who have or have had a continuing relationship of a romantic or intimate nature.

4. The Performance Management Cycle

4.1 Teachers

The performance management cycle will run from September – August.

Final reviews will be completed in time to allow for any pay decisions to be made by 31 October (31 December for headteachers).

4.2 Support Staff

The performance management cycle will run from April – March.

Final reviews will be completed in time to allow for any pay decisions to be made by 31 March.

5. Objective Setting

5.1 Objectives will be set before, or as soon as possible after, the start of each appraisal cycle.

5.2 The objectives set for each reviewee will be SMART (specific, measurable, achievable, realistic and time-bound) and the number of objectives will be reasonable having regard to the nature of the role.

5.3 The reviewer and reviewee should each consider appropriate objectives and should seek to agree them through discussion. In the absence of agreement, the reviewer will determine the objectives. The objectives, and any training and support identified (see 6.3 below) will be set out in writing. The form at Appendix A may be used for this purpose.

5.4 The Trust Board may consult with an external advisor when setting objectives for the CEO. The Trust Board will consult with the CEO when setting objectives for the headteacher.

5.5 The objectives, if achieved, will contribute to the Academy/Trust's plans for improving educational provision and performance, improving the education of pupils and improving and developing the performance of staff. To ensure this, objectives will be quality assured against the improvement plan and moderated across the Academy/Trust to ensure consistency and fairness.

5.6 Objectives may be revised in-year where circumstances change.

6. Monitoring and supporting performance

6.1 Observation

The Trust believes that observation is important both as a way of assessing strengths and areas for development and for gaining important information which can inform improvement more generally.

All staff should expect to have their performance and work observed and assessed by their line manager, reviewer and/or senior leaders. This will include where relevant, formal and 'drop-in' classroom observations for the purposes of evaluating the standards of teaching and learning and to check that high standards of professional performance are established and maintained.

The amount and type of such observations will be proportionate to the performance of the reviewee and the needs of the school.

All observation will be carried out in a supportive fashion and, in the case of teachers, by someone with QTS.

6.2 Feedback

Reviewees will receive constructive feedback on their performance throughout the year and as soon as practicable after observation has taken place or other evidence has come to light.

6.3 Training and Support

The Trust expects all staff to take responsibility for improving their own performance through appropriate continuing professional development. Professional development will be linked to improvement priorities and individual job roles, priorities and ambitions. Specific support, guidance and development needs will be identified through the performance management process.

7. Reviewing Performance

7.1 All staff will be assessed on their overall performance taking into account:

- any professional standards applicable to that role;
- performance against their performance management objectives;
- the requirements of their job roles and the degree to which they have taken responsibility for their own CPD.

7.2 Performance and development priorities will be considered and addressed on a continuous basis throughout the year and there will be informal meetings as necessary to consider progress against objectives. There may be formal review meetings during the year. Performance management meetings will take place during working/directed time, excluding PPA time unless otherwise agreed.

7.3 End of Year Review

At the end of the cycle, each reviewee's performance will be formally assessed. In the case of the CEO, the CEO's performance management panel will consult the external advisor. In the case of the headteacher, the headteacher's performance management panel will consult the CEO.

The reviewer and reviewee will meet to discuss progress against objectives and overall performance.

The reviewee will receive, and have an opportunity to comment on, a written report (the form at Appendix A may be used for this purpose) which will include:

- An assessment of the reviewee's performance against the objectives

- An assessment of overall performance with particular reference to performance against the job role and any standards relevant to the role;
- An assessment of how the employee and school has identified and met their training, development and support needs and the impact of learning on their performance;
- A recommendation on pay (to the headteacher where applicable).

7.4 Absence

Where an employee has been absent during the performance management cycle, performance will be assessed on the basis of any and all evidence available for the periods of attendance and where necessary on prior performance.

8. Unsatisfactory Performance

8.1 If at any point in the cycle, evidence emerges that an employee's performance has fallen below the minimum standards expected of them, the reviewer or other appropriate manager, will:

- explain the nature and seriousness of the concerns;
- detail any previous discussions/support;
- give the employee the opportunity to comment and discuss concerns.

This may also apply where employees consistently fail to develop their skills and knowledge or to sustain the expected level of performance.

Any concerns and subsequent discussion will be confirmed in writing to the employee.

The manager will normally (see 8.2 below) set a monitoring period. This will involve:

- the setting of targets for future performance (in addition to existing performance management targets) ;
- agreeing any further support with the employee;
- making it clear how, and by whom, progress will be monitored and when it will be reviewed;
- explaining the consequences and process if no, or insufficient, improvement is made or improvement is not sustained.

The period of monitoring will normally be between 4 and 8 working weeks and in any case shall only be as long as is necessary to allow reasonable time for improvement and this will depend on the seriousness of the issues and individual circumstances. Exceptionally, an extension of not normally more than 4 weeks may be granted, where there has been significant improvement or there has been significant absence during the monitoring period.

Regular contact will be maintained throughout the monitoring period to review and support progress.

8.2 Where performance concerns are particularly serious, and/or where there has been insufficient improvement following any monitoring period, the performance management procedure will be suspended and the formal capability procedure will be invoked.

9. Confidentiality

9.1 A written record of all meetings conducted under this procedure will be made, either by the person holding the meeting or by an alternative person arranged to take notes. The Trust processes any personal data

collected during the performance management procedure in accordance with its data protection policy. Any data collected is held securely and accessed by, and disclosed to, individuals only for the purposes of completing the performance management procedure or as set out in 9.2 below. On the conclusion of the procedure, data collected will be held in accordance with the Trust's retention schedule. Inappropriate access or disclosure of employee data constitutes a data breach and should be reported in accordance with the Trust's data protection policy immediately. It may also constitute a disciplinary offence, which will be dealt with under the disciplinary procedure.

9.2 The performance management process and related paperwork will be treated with confidentiality. However, performance management paperwork may be shared beyond the reviewer and reviewee in the following circumstances:

- with senior leaders for the purposes of quality assurance;
- with the headteacher for the purpose of assessing eligibility to progress to the Upper Pay Range and meeting HLTA and other relevant standards;
- where poor performance is identified;
- with those responsible for making pay decisions.

Appendix A – Sample PM Form

PERFORMANCE MANAGEMENT STRICTLY CONFIDENTIAL

NAME OF REVIEWEE		
JOB TITLE		
NAME OF REVIEWER		
PM CYCLE DATES	From	To

Professional Standards applicable to the role	

Key aspects of the school improvement plan relevant to the role	• • • • •

Date of initial meeting	
Date(s) of informal review meeting(s)	
Date of final review meeting	

Objectives (Key performance priorities for the year)	**Measures/Milestones** (How/when will objective be achieved)	**Summary of success/ achievements through the year** (Record of evidence)

Objectives (Key performance priorities for the year)	**Measures/Milestones** (How/when will objective be achieved)	**Summary of success/ achievements through the year** (Record of evidence)

Development required (Skills, knowledge etc.)	**Delivery** (How will development needs be met?)	**Examples of application/impact** (Has this added value to the role, how has this been applied?)

End of Year Review	
Assessment against Objectives (Summary of achievements, evidence etc)	
Assessment of performance against job role	
Assessment of overall quality of teaching against relevant Professional Standards	
Assessment of reviewee's CPD activity	
Pay Recommendation (if applicable)	Performance Pay Progression criteria set out in the Pay Policy have / have not been met: Current Pay level: £ Pay Progression recommendation: new pay level: £

Signed…… (Reviewer) Date…… Signed (reviewee) Date……	Employee's comments