



PERFORMANCE MANAGEMENT PROCEDURE

September 2025

Passmores Co-operative Learning Community

PCLC Position Statement

All PCLC schools have an approach that is based on the following key principles:

- Our unconditional positive regard ensures that every young person is highly valued and expected to achieve their potential;
- every young person has the right to be successful and has ability to achieve, no matter what their socio-economic background;
- there is no limit to achievement – intelligence can be developed;
- each student must know what to do in order to improve and how to do it, high expectations
- on their own are not enough;
- consistency of experience is fundamental; each school is a team and consistency makes us
- greater than the sum of our parts;
- employment opportunities in PCLC schools should allow all colleagues to inspire a love for learning; not simply process and record what we find.

By ensuring all of actions and decisions adhere to these principles our community members:

- are highly valued and expected to achieve their full potential, no matter what their
- socio-economic background;
- benefit from an inclusive ethos, excellent teaching and a broad and balanced
- curriculum underpinned by strong leadership, in a local school;
- are supported and encouraged to lead healthy and active lives making sensible choices,
- whilst respecting the views and attitudes of others.

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This procedure is based on the Juniper Education model, released in March September 2024.
Updated September 2025.

The PCLC Trustees formally approved the procedure on the 20th October 2025

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 or fully develop the skills and access 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 & RESPONSIBILITIES

3.1 Performance Management Reviewers

- The CEO will be appraised annually by a committee consisting of two trustees and one external advisor.
- The Executive Headteacher will be appraised annually by a committee consisting of nominated trustee and one external advisor. The process will be overseen by the CEO.
- The Principal of Passmores, The Headteacher of Stewards, Head of School at Purford Green and Potter Street and the Headteacher of The Downs and Pear Tree Mead will each be appraised annually by a committee consisting of up to two nominated LGB governors (other than the Executive Headteacher) and one external advisor. This process will be overseen by the CEO.
- There will be an initial appraisal and an interim review. The committee members will be the same for both
- The Principal/Headteacher will appoint reviewers for other staff.
- The role of the performance management reviewer is to operate the performance management procedure in its entirety. The reviewer/headteacher/principal 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/Headteacher's/Principal'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/Head of school 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

4. THE PERFORMANCE MANAGEMENT CYCLE

4.1 Teachers

The performance management cycle will run from September – July. Final reviews will be completed in time to allow for any pay decisions to be made by 31st October (31st December for CEO, Executive Headteacher, Principal, Head of School).

4.2 Support Staff

The performance management cycle will run from September – July.

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. Objectives will not be based on teacher generated data and predictions, or solely on the assessment data for a single group of pupils.
- 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 will consult with the external advisor when setting objectives for the CEO/ Executive Headteacher, Principal/Headteacher/Head of School.

- 5.5 The objectives, if achieved, will contribute to the Trust’s vision for the education of the whole of the PCLC community. 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, including where there are periods of absence

6. REVIEWING PROGRESS (TEACHERS)

6.1 The following statement is designed to clarify what is expected of PCLC teachers so that:

- there is no doubt about the level of performance required by our teachers;
- the need to reduce performance measures to overly specific and inflexible numerical targets is obviated.

It is a given that the assessment of a teacher’s performance during the performance management review meeting will be rooted in evidence. However, it is important to be clear that the final judgement of a teacher’s performance on our colour system will be made within the context of our school

Judgements will be made with professional wisdom and will take into account a teacher’s contextual analysis of the academic performance of students in his/her/their individual classes.

6.2 Levels of performance:

Teachers’ Standards	Teachers’ standards are not fully met, with minor issues across a number of standards or larger issue/s within an individual standard	Teachers’ standards are not fully met due to minor issues within a limited number of standards	Teachers’ standards are met securely	Exceptional performance
Observations/CPD	H&S or safeguarding concerns	Below career stage expectation	At career stage expectation	Above career stage exception
Objectives	H&S or safeguarding concerns	The objective has not been met in full	The objective has been met	The objective has been met above and beyond expectation

6.3 In extraordinary circumstances the Trustees’ Pay Committee will consider use of its discretion to award more than two points, up to a maximum of four points, in one year.

- 6.4 The performance management cycle is annual, but on occasions it may be appropriate to set objectives that will cover a period over more than one cycle. In such cases, the basis on which the progress being made towards meeting the performance criteria for the objective will be assessed at the end of the first cycle and will be recorded on the school system and transferred at the beginning of the next cycle.
- 6.5 The performance management cycle has two check points where there are opportunities to review progress towards meeting both the teachers' standards and the reviewees objectives; interim reviews in the Spring and Summer terms and a lesson observation prior to the Spring meeting. Reminders will be sent via the school system where evidence of all interim review meetings are logged. At the end of every interim review meeting the reviewer will make it clear how well she/he is doing against the teachers' standards and specifically against her/her performance management objectives.
- 6.6 If at any time of the performance management cycle, the reviewer/ reviewee judges that there is a danger of not meeting the teachers' standards, swift remedial action should be taken as outlines in section 9

Review progress towards meeting the teachers' standards and appraisal objectives

EARLY SUMMER 1

Planning & Review Meeting:

Review of performance against the teachers' standards; set appraisal objectives

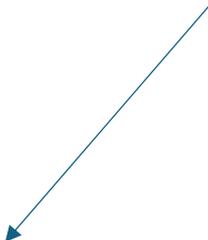
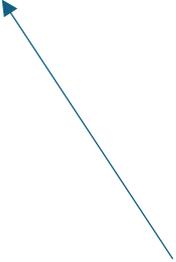
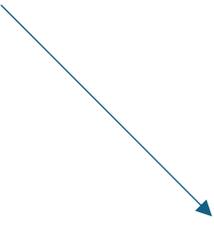
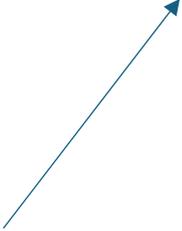
AUTUMN 1

Lesson observation(s) & feedback.

BEFORE INTERIM REVIEW MEETING

Review progress towards meeting the teachers' standards and appraisal objectives

SPRING 1



7. MONITORING AND SUPPORTING PERFORMANCE

7.1 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. Where possible, notice and information on the focus of the observation will be given. All observations will be carried out in a supportive fashion, and in the case of teachers, by someone with QTS. Feedback will be focussed on key pedagogical approaches that are evidence and experience based. The Foci and expectations will be made clear to all staff.

7.2 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.

7.3 Training & 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.

8. REVIEWING PERFORMANCE

8.1 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 role and the degree to which they have taken responsibility for their own CPD.

8.2 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.

8.3 At the end of each cycle, each reviewee's performance will be formally assessed. The reviewer and reviewee will meet to discuss progress against objectives and overall performance.

The reviewee will receive and have the opportunity to comment on a written report (the form at Appendix A & B may be used for this purpose or an alternative appropriate online form), 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 Academy/Trust has identified and met their training, development and support needs and the impact of learning on their performance

8.4 Absence

Where an employee has been absent during the performance of 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

9. UNSATISFACTORY PERFORMANCE

9.1 Where there are concerns about any aspects of the teacher's performance, the appraiser will meet the teacher to establish an improvement plan. They will:

- inform the employee that they are going to be receiving informal support due to performance concerns
- give clear and specific feedback to the employee about the nature and seriousness of the concerns
- give the employee the opportunity to comment and discuss the concerns
- set clear objectives and timescales for require improvement
- agree any support (e.g. coaching, mentoring, structured observations), that will be provided to help address those specific need concerns
- make clear how and by when progress will be reviewed
- explain the implications and process if no, or insufficient improvement is made e.g. commencement of capability procedure

The improvement plan review period will normally be a minimum of six 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.

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

8.2 Where the underperformance concerns are serious, and/or where there has been insufficient improvement following any informal support, the performance management procedure will be suspended and the formal capability procedure will be invoked

10. CONFIDENTIALITY

10.1 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 in 10.2 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.

10.2 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 purpose of quality assurance
- with the headteacher/principal/head of school for the purpose of assessing eligibility to progress to the Upper Pay Range and meeting HLTA and other relevant standards
- when poor performance is identified
- with those responsible for making pay decisions

11. APPEALS

11.1 At specified points in the Performance Development process, teachers and the Principal/Headteacher/Head of School have the right to appeal against any of the entries on the school system. When a reviewee wishes to appeal on the basis of more than one entry, this would constitute one appeal hearing. Details of the appeals process are covered in section 21 of the PCLC's Pay Policy

12. TRAINING & SUPPORT

12.1 The PCLC's Continuing Professional Development (CPD) programme will be informed by the training and development needs identified on the school system. The core CPD provision will be through the Professional Learning Programme.

12.2 The Trustees will ensure in the budget planning that, as far as possible, appropriate resources are made available for any training and support agreed for reviewees.

12.3 With regard to the provision of CPD in the case of competing demands on the academy budget, a decision on relative priority will be taken with regard to the extent to which (a) the CPD needs identified is essential for a reviewee to meet their objectives; and (b) the extent to which the training and support will help the school to achieve its priorities. There is the opportunity for all staff to suggest to the Assistant Principal/Assistant Headteacher with responsibility for CPD aspects of pedagogy which could be a focus for whole-school teaching training.

12.4 All reviewers will be provided with training to enable them to discharge all aspects of their role appropriately and effectively, including the conduct of Performance Management reviews, objective setting, classroom observations, and providing quality feedback to reviewees. Training for reviewers will be delivered by the Principal/Headteacher with support from the Vice-Principal/Deputy Headteacher. Training on lesson observations will be made available for all relevant staff throughout the academic year.

APPENDIX A - CAREER STAGE EXPECTATIONS

TEACHING STANDARDS AND AGREED CAREER STAGE EXPECTATIONS

Each of the standards is underpinned by further detail, which is linked below to Professional: Practice, Outcomes, Relationships, Professional Development and Conduct.

Teachers make the decision of their students their first concern, and are accountable for achieving the highest possible standards in work and conduct. Teachers act with honesty and integrity; have strong subject knowledge and skills as teachers up-to-date and are self-critical; forge positive professional relationships; and work with parents in the best interests of their students.

PART 1: Teaching

A teacher must:

- T1** Set high expectations which inspire, motivate and challenge students
- T2** Promote good progress and outcomes by students
- T3** Demonstrate good subject and curriculum knowledge
- T4** Plan and teach well-structured lessons
- T5** Adapt teaching to respond to the strengths and needs of all students
- T6** Make accurate and productive use of assessment
- T7** Manage behaviour effectively to ensure a good and safe learning environment
- T8** Fulfil wider professional responsibilities

PART 2: Personal and Professional Conduct

The following statements define the behaviour and attitudes, which set the required standard for conduct throughout a teacher's career

- PCC-a** Teachers uphold the public trust in the profession and maintain high standards of ethics and behaviour, within and outside school
- PCC-b** Teachers must have a proper and professional regard for the ethos, policies and practice of the school in which they teach, and and maintain high standards in their own attendance and punctuality
- PCC-c** Teachers must have an understanding of, and always act within, the statutory frameworks which set out their professional duties and responsibilities.

Professional Area	M1-M2	M3-M4	M5-M6	UPS1-2	UPS 3
PROFESSIONAL PRACTICE	Most of the standards are met competently, and good progress in being made towards others	All standards are met competently	All standards are met with confidence	All standards are met with expertise	All standards are met with a high level of expertise
PROFESSIONAL OUTCOMES	Most students achieve in line with school expectations	Almost all students in line with school expectations	Almost all students achieve in line with school expectations and some exceed them	Almost all students achieve in line with school expectations, and some exceed them	Almost all students achieve in line with school expectations and many exceed them
PROFESSIONAL RELATIONSHIPS	Positive working relationships with students, colleagues and parents	These relationships are securely focussed on improving provision for students	Professional relationships with students, colleagues and staff lead to excellent class provision	Plays a proactive role in building key stage or departmental teams to improve provision and outcomes	Plays a proactive role in building school-wide teams to improve provision and outcomes
PROFESSIONAL DEVELOPMENT	Able, with support, to identify key professional development needs and respond to advice and feedback	Takes a proactive role in accessing relevant support and professional development from colleagues	Fully competent practitioner able to keep up-to-date with changes and adapt practice accordingly	Plays a proactive role in leading the professional development of key stage or departmental colleagues	Plays a active role in leading the professional development of colleagues across the school
PROFESSIONAL CONDUCT	Meets all standards	Meets all standards	Meets all standards	Meets all standards	Meets all standards

UPS should ensure that the teacher is highly competent in all elements of the relevant standards; and that the teacher’s achievements and contribution to an educational setting is substantial and sustained.

APPENDIX B: SAMPLE PM FORM

<p>PERFORMANCE MANAGEMENT STRICTLY CONFIDENTIAL</p>
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NAME OF REVIEWEE	
JOB TITLE	
NAME OF REVIEWER	
PM CYCLE DATES	FROM: TO:

Professional Standards applicable to the role	
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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)

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)	<p>Performance Pay Progression criteria set out in the Pay Policy have/have not been met:</p> <p>Current pay level: £</p> <p>Pay Progression recommendation: new pay level: £</p>

<p>Signed: (Reviewer)</p> <p>Date:</p> <p>Signed: (Reviewee)</p> <p>Date:</p>	<p>Employee's comments:</p>
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APPENDIX C

PCLC Upper Pay Scale Self Evaluation

When a teacher is successful in moving through the 'threshold' onto the Upper Pay Scale there are additional expectations. To successfully move onto the Upper Pay Scale, we must be satisfied that:

- The teacher is highly competent in all elements of the relevant standards (The Teaching Standards)
- The teacher's achievement and contribution to an educational setting or settings are substantial and sustained

Definitions:

Substantial: means of real importance, validity, or value to the school; play a critical role in the life of the school; provide a role model for teaching and learning, make a distinctive contribution to the raising of student standards; take advantage of appropriate opportunities for professional development and use the outcomes effectively to improve students' learning

Highly competent: means performance which is not only good but also good enough to provide coaching and mentoring to other teachers, give advice to them and demonstrate to them effective teaching practice and how to make a wider contribution to the work of the school, in order to help them meet the relevant standards and develop their teaching practice

Sustained: means continuously over a long period; at PCLC schools this is defined as 3 school years.

Overleaf is a self-evaluation form that should be filled in annually by those staff applying for or already placed on the Upper Pay Scale. It will form an integral part of the Performance Management conversation.

UPS Teacher Self Evaluation Form

Teaching & Learning

- I set ambitious expectations that inspire and motivate all pupils.
- I demonstrate strong subject knowledge and share expertise with colleagues.
- I plan and deliver consistently high-quality lessons.
- I adapt teaching to meet the needs of all learners, including SEND and disadvantaged pupils.
- I use assessment effectively to secure progress and support others in doing so.
- I model excellent behaviour management and help colleagues develop their practice.

Impact Beyond the Classroom

- I share good practice, mentor/coach colleagues, and support trainees.
- I contribute to curriculum design and whole-school improvement.
- I take a leading role in initiatives that improve outcomes and culture across the school.
- I play an active part in the wider life of the school and community.

Professional Conduct

- I model the highest professional standards and integrity.
- I foster positive working relationships and act as a role model.
- I actively contribute to colleagues' professional development.

Overall: UPS teachers lead by example, have sustained impact on pupils' outcomes, and influence the practice of others across the school.