Performance Management Policy

Sept 2026

Passmores Co-operative Learning Community

Approved by: PCLC Trust Board	**Date:** September 2026
Last reviewed on:	
Next review due by: September 2027	

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 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.

4	Equality Act and Reasonable Adjustments	Addition of new clause to directly address DfE guidance which required schools to consider protected characteristics, wellbeing, working pattern & reasonable adjustments
8.4	Absence	Addition to clarify absences linked to health may result in OH referral and temporary pause if performance management process in some cases
9	Unsatisfactory performance	Clarifying statement regarding distinguishing performance management is not linked to disciplinary.
7.3	Reviewing Performance	Updated wording relating to pay recommendation where PRP is retained in line with STPCD.

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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 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 and Responsibilities

3.1 Performance management reviewers

- The trust board will appoint a performance management reviewer for headteachers and the CEO.
- The headteacher will appoint performance management reviewers for other staff in their academy.
- The CEO will appoint performance management reviewers for centrally employed staff.

The role of the performance management reviewer is to operate the performance management procedure 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 headteacher's appraisal.
- 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 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.

4. Equality Act and Reasonable Adjustments

The school will ensure that this procedure is applied fairly and consistently. Particular regard will be given to any known disability, medical condition, pregnancy, menopause, wellbeing concern, caring responsibility or other circumstance that may impact performance. Reasonable adjustments will be considered and implemented where appropriate in accordance with the Equality Act 2010.

5. The Performance Management Cycle

5.1 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).

5.2 Support Staff

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.

6. Objective Setting

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

6.2 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 soley based on teacher generated data and predictions, or solely on the assessment data for a single group of pupils.

6.3 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 will be used for this purpose.

6.4 The Trust board will consult with the external advisor when setting objectives for the headteacher

6.5 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.

6.6 Objectives may be revised in-year where circumstances change, including where there are periods of absence.

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.

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 Academy/Trust.

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

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. Where appropriate, such feedback will be confirmed in writing.

7.3 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.

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 and the PCLC Performance Pillars; the requirements of their job roles 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 by both parties.

8.3 At the end of the 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 an opportunity to comment on, a written report (the form at Appendix A will 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 the reviewee's performance against the PCLC performance pillars:
- 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;
- A recommendation on pay where relevant (to the headteacher where applicable).

Pay progression for teaching and support staff will not normally be withheld unless the employee is subject to the capability procedure (where PRP is no longer operated)

Pay progression for the leadership group will be subject to the individual demonstrating a sustained* high quality of performance. Determination of whether there has been "sustained high quality of performance" will be made in accordance with the criteria outlined in Appendix C of the Pay Policy.

*For the purpose of this document "sustained" is defined as 2 consecutive years

8.4 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.

Where performance concerns may be linked to an employee's health, wellbeing or attendance, appropriate support will be considered including referral to Occupational Health where appropriate. The school/Academy/Trust will determine whether performance management should continue, be modified or be temporarily suspended depending on the circumstances.

9. Unsatisfactory Performance

9.1 Where there are concerns about any aspects of the employee's performance the appraiser will meet the employee 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 required improvement;
- agree any support (e.g. coaching, mentoring, structured observations), that will be provided to help address those specific 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.

9.2 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. Informal support is not a disciplinary sanction and will not result in a formal warning.

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 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.

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 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.



Performance Management

Confidential

PERFORMANCE MANAGEMENT
CONFIDENTIAL

EMPLOYEE NAME		
JOB TITLE		
APPRAISER NAME		
PM CYCLE DATES		

Professional Standards applicable to the role	
Professional Standards working towards	

Date of initial meeting	
Signed (Employee)	
Signed (Appraiser)	

Date(s) of informal review meeting(s)	

Date of final review meeting	
Signed (Employee)	
Signed (Appraiser)	

Mission

Passmores Cooperative Learning Community has created a group of academies with a reputation for delivering a great education to all our young people, whilst ensuring a sense of family and belonging for all members of our community.

All our young people:

• 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.

Trust Vision

All our young people will enjoy their learning, understand that we all continue to learn throughout our lives, attain high outcomes and be helped to become confident individuals and responsible citizens, whilst making excellent progress.

Trust Priorities

• Create an environment to support students' growth, including mental health

• Improve outcomes for disadvantaged students

• Define and demonstrate high expectations

• Maintain financial efficiency

• Pursue ethical and sustainable expansion

• Develop reading so all students leave with reading age in line with chronological age

Trust Values

Openness, Caring for others, Honesty, Equality, Solidarity, Equity, Self-help, Democracy, Self-responsibility, Social responsibility

Core Principles

• Every young person is highly valued and expected to achieve

• There is no limit to achievement

• Students must know how to improve

• Consistency is fundamental

• Inspire a love of learning

Purpose of Performance Management

Performance management at PCLC is used to support professional development, ensure accountability and improve outcomes for children. It is focused on growth, support and impact, and is not a standalone mechanism for determining pay progression.

Teachers' Standards (Teaching Staff)

The Teachers' Standards form the foundation of practice for all teachers and represent the minimum expectation. They underpin all judgements within this process and are considered over time, based on typical day-to-day practice rather than isolated events.

Application by career stage:

• Early Career Teachers – developing consistency with structured support and feedback

• Main Scale – consistently meeting the standards independently

• Upper Pay Scale – strong, sustained practice with wider contribution and support to others

• Leaders – securing strong practice through others and leading improvement

Evidence is drawn from normal professional activity (lesson visits, work scrutiny, outcomes, planning and professional dialogue). No additional evidence folders are required. Focus is on impact on pupils, particularly disadvantaged pupils and those with SEND.

Performance Pillars (All Staff)

Pillar	1 – Needs Development	2 – Meets Expectations	3 – Exceeds Expectations	Teaching Example	Non-Teaching Example
Professional Integrity	1: Inconsistent reliability and ownership	2: Reliable, responsible, meets expectations	3: Models professionalism and supports others	Teaching: meets deadlines, uses data effectively	Non-teaching: accurate admin, effective use of systems (e.g. Arbor)
Team Contribution	1: Limited contribution	2: Works well within team	3: Leads and strengthens team	Teaching: shares practice, contributes to department	Non-teaching: supports team functions and cross-trust work
Inclusive Practice	1: Inconsistent awareness of needs	2: Supports all pupils fairly	3: Champions inclusion	Teaching: adapts teaching for SEND/disadvantaged	Non-teaching: supports vulnerable pupils and processes
Communication	1: Unclear or inconsistent	2: Clear and professional	3: Strengthens communication systems	Teaching: effective with parents/carers	Non-teaching: strong front-facing communication
Responsiveness and Impact	1: Slow to respond	2: Responds and improves practice	3: Proactive and drives improvement	Teaching: uses assessment to adapt	Non-teaching: responds to safeguarding/attendance issues
Community Engagement	1: Limited awareness	2: Contributes to wider role	3: Strengthens community links	Teaching: tutor/enrichment	Non-teaching: supports environment and events

PMR Targets 26/27

Objective	Linked Priority	Priority	Completion	Success Criteria	Milestones	Actions/Support	Outcome
e.g Improve outcomes for disadvantaged pupils across classes taught	Disadvantaged outcomes	High	Summer term	Disadvantaged pupils make progress in line with or above peers	Autumn: identify gaps; Spring: targeted teaching/intervention; Summer: secure outcomes	Assessment analysis; adaptive teaching; targeted support; parental engagement	

Mid Year Review -progress against objectives (including milestones and early completion):

Objectives completed early and impact achieved:
Where progress is limited and why:
Support required (CPD, coaching, resources):
Any amendments to objectives or timelines:
Employee reflection:
Line manager summary:

End of Year Review

Review of objectives (timing, completion and overall impact):

Performance against pillars (strengths and areas for development):
Impact on disadvantaged pupils / key groups:
For teachers: summary against Teachers' Standards:
Overall strengths:
Areas for development next year:
Employee reflection:
Line manager judgement (1–3) with rationale:
Where performance is judged as 1 (Needs Development), a support plan will be put in place

Teachers' Standards – PCLC Guidance and Descriptors

This appendix combines detailed guidance with indicative descriptors to support consistent professional dialogue. It is not a checklist, but a shared understanding of expectations across PCLC.

How the Standards are Used in PCLC

• Judged through typical day-to-day practice over time

• Evidenced through normal professional activity

• Applied in line with career stage

• Focused on impact on pupils, particularly disadvantaged pupils and those with SEND

1. Set high expectations

Teachers establish a culture of high expectations, ensuring all pupils are challenged and supported to succeed. In PCLC this means consistent routines, strong relationships, and a clear belief that all pupils can achieve highly.

In PCLC, particular attention should be given to the impact of this standard on disadvantaged pupils and those with SEND.

1 – Expectations are inconsistent; some pupils are not sufficiently challenged

2 – High expectations are consistently evident for all pupils

3 – Highly aspirational culture; actively supports others to raise expectations

2. Promote good progress and outcomes

Teachers are accountable for pupils' progress and use assessment to support learning. In PCLC this means knowing pupils well, identifying gaps quickly, and responding with effective teaching and intervention.

In PCLC, particular attention should be given to the impact of this standard on disadvantaged pupils and those with SEND.

1 – Limited awareness of pupil progress or gaps

2 – Uses assessment to support good progress

3 – Secures strong progress and supports others to do so

3. Demonstrate good subject and curriculum knowledge

Teachers have secure subject knowledge and understand how to teach it effectively. In PCLC this means clear explanations, anticipating misconceptions and delivering a coherent curriculum.

In PCLC, particular attention should be given to the impact of this standard on disadvantaged pupils and those with SEND.

1 – Gaps in subject knowledge impact teaching

2 – Secure subject knowledge and clear explanations

3 – Deep knowledge; supports others and develops curriculum

4. Plan and teach well-structured lessons

Lessons are sequenced and build understanding over time. In PCLC this means strong modelling, effective questioning and opportunities for practice that lead to secure learning.

In PCLC, particular attention should be given to the impact of this standard on disadvantaged pupils and those with SEND.

1 – Lessons lack structure or coherence

2 – Lessons are well-structured and build understanding

3 – Highly effective teaching that leads to strong learning over time

5. Adapt teaching to respond to strengths and needs

Teaching meets the needs of all learners. In PCLC this means effective adaptation for SEND and disadvantaged pupils without lowering expectations.

In PCLC, particular attention should be given to the impact of this standard on disadvantaged pupils and those with SEND.

1 – Limited adaptation for needs

2 – Teaching meets needs of most pupils

3 – Expert adaptation ensuring all pupils succeed

6. Make accurate and productive use of assessment

Assessment informs teaching and supports progress. In PCLC this means using data intelligently and acting on it to improve outcomes.

In PCLC, particular attention should be given to the impact of this standard on disadvantaged pupils and those with SEND.

1 – Assessment not used effectively

2 – Assessment informs teaching and supports progress

3 – Assessment is highly effective and informs others' practice

7. Manage behaviour effectively

Teachers create a safe and productive learning environment. In PCLC this means consistent application of behaviour systems and strong relationships with pupils.

In PCLC, particular attention should be given to the impact of this standard on disadvantaged pupils and those with SEND.

1 – Inconsistent behaviour management

2 – Consistent, calm and effective

3 – Highly effective; supports wider behaviour culture

8. Fulfil wider professional responsibilities

Teachers contribute to the wider life of the school. In PCLC this means working collaboratively, engaging with CPD and contributing beyond the classroom.

In PCLC, particular attention should be given to the impact of this standard on disadvantaged pupils and those with SEND.

1 – Limited contribution beyond classroom

2 – Contributes effectively to team and school

3 – Leads and strengthens wider practice

Part 2: Personal and professional conduct

Teachers uphold high standards of conduct and professionalism. In PCLC this means acting with integrity, treating others with respect and maintaining trust with pupils, parents/carers and colleagues.

In PCLC, particular attention should be given to the impact of this standard on disadvantaged pupils and those with SEND.

1 – Inconsistent professionalism

2 – Professional and reliable

3 – Exemplary role model

Application by Career Stage

• Early Career Teachers – developing consistency with structured support

• Main Scale – consistently meeting standards independently

• Upper Pay Scale – strong sustained practice and wider contribution

• Leaders – securing strong practice through others

Appendix B – Example

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