



PERFORMANCE DEVELOPMENT POLICY

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REVISIONS

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2.0		First approval	13.10.2022
2.1	P3/6.4.3	Amended to recognise Executive DHT roles	15.06.2023
2.2	Tile/various	Amended terminology from Performance Development to Performance Development throughout.	2024

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1. Introduction

- 1.1. The Performance Development Policy must be read and applied in conjunction with OWN Trust's Staffing Policy Statement.
- 1.2. This policy aims to set out the framework for a clear and consistent assessment of the overall performance of employees covered by the Performance Development procedure and for supporting their development within the Trust's plan for improving educational provision and performance, and the standards expected of employees in their respective roles.

2. Philosophy

- 2.1. At OWN Trust, we aim for all our staff to feel valued, supported and encouraged to perform at their very best, whatever their position. We want colleagues to understand the interdependence of all roles and to positively challenge themselves and each other to achieve the best we can for the children in our care. We promote radical candour - caring personally and challenging directly. We strive to encourage curiosity in all staff, developing an eagerness to seek out the best in education and support service practice.

3. Aims

- 3.1. The overriding aim of Performance Development in OWN Trust is to encourage and stimulate the best performance from all colleagues, no matter their role in the Trust.
- 3.2. Performance Development will be a means of supporting all leaders to deliver their strategic aims for academy improvement and to raise standards in all areas.
- 3.3. Performance Development processes will provide opportunities for all staff to reflect on, develop and discuss their practice in a supportive, professionally expert environment.

- 3.4. Processes for addressing underperformance are already suitably and adequately provided in the Trust Capability Policies, and through informal and formal support plans. Performance Development will be used as a tool for continuous improvement.
- 3.5. All leaders will create a culture of high challenge and low-threat accountability through their use of radical candour, honest conversations and proactive intervention.
- 3.6. To free colleagues up to concentrate on self and mutual improvement, Performance Development will no longer be linked directly to pay. OWN Trust will not operate performance related pay from September 2022. All staff, other than those on an informal or formal support plan, will receive an increment annual pay rise within their pay scale, where this is in line with OWN Trust's Pay policies, in addition to the cost-of-living uplift agreed by the government.
 - 3.6.1. In line with expectations regarding applications to progress to the Upper Pay Scale (see pay policy 6.6.6) and movement along the Upper Pay Scale, sustained is defined as 'continuously over a period of **2 years** showing teaching practice that has grown over that period and is now consistently good to outstanding'.

4. Rationale

- 4.1. Currently, there is little evidence that Performance Related Pay (PRP) works to raise school standards and pupil achievement. As importantly, there is no evidence that PRP raises the quality of teaching, leadership or staff motivation. Where the focus is on pay progression rather than the link to appropriate and developmental professional learning and opportunities, standards stall.
- 4.2. The Education Endowment Foundation says that the average impact of performance pay schemes was "just above zero months' progress". (Schools Week 19/10/19)
- 4.3. Several high-performing schools and Trusts have moved away from PRP and seen continuation of high standards and outcomes, as well as positive publicity and recruitment advantages.
- 4.4. School cultures will shift universally to one of aspiration with staff taking a more proactive role in their own improvement.
- 4.5. Significant amounts of leadership time are spent on checking and measuring progress of individuals to numerical targets. Where teachers take over a class mid-year or share a class this is almost impossible to do accurately. This time will be better spent on focusing on improvement towards high level standards across the board.
- 4.6. Leaders will focus more acutely and robustly on any colleagues not meeting standards and requiring informal or formal capability support.

5. Standards

- 5.1. OWN Trust aims to recruit and grow the best leaders, teachers and staff. We have the highest expectations of staff performance.
- 5.2. We will benchmark performance against nationally agreed standards where possible, such as the National Standards for Excellence for Headteachers, the National Teaching Standards, and the ISBL standards for Business leaders.
- 5.3. We will augment these by additional internal standards, such as the Quality of Teaching Matrices, drafted in consultation with leaders and staff.
- 5.4. All OWN Standards will seek to have a 4-point progression scale to support development, professional learning provision, and improvement, and to support the mapping of expertise and talent across schools and the Trust at all levels.

6. Process

- 6.1. All staff are entitled to scheduled, focused discussions about their performance, in addition to ongoing conversations throughout the year.
- 6.2. The annual Performance Development meeting with a line manager (usually held at the end of the academic year) should review strengths and areas for development based on an honest self and line manager assessment against the appropriate standards. Evidence will be provided via a presentation from the appraisee (minimal – e.g. 2 PowerPoint slides for teachers, or group presentations for agreed identified staff to allow flexibility) that summarises the evidence discussed throughout the year as part of the ongoing dialogue with the reviewer.
- 6.3. Evidence required for threshold applications will be in line with the OWN Trust Teaching Staff Pay Policy
- 6.4. Senior Leadership reviews will take place with the relevant people as follows:
 - 6.4.1. CEO – Chair of Trustees, Trustee for HR, 1 additional Trustee. In addition, an external advisor may be sought where needed
 - 6.4.2. Headteacher – CEO, Chair of Governors (or nominated representative), 1 trustee. In addition, an external advisor may be sought where needed
 - 6.4.3. Deputy Headteacher – CEO, Chair of Governors (or nominated representative), Headteacher. (Where the deputy is working across the Trust as an Executive Deputy Headteacher, instead of just one school the panel may be CEO, Headteacher of another school in the Trust.)

6.4.4. CFO – CEO, Chair of Trustees or nominated representative

6.4.5. Governance & Compliance Manager – CEO, Chair of Trustees or nominated representative

6.4.6. All other roles will be reviewed in line with school or central office line management structures.

- 6.5. From the ensuing discussion, and with reference to the OWN Standards and individual need, three developmental targets should be set for the remainder of the academic year. Targets should be linked to professional and personal improvement, and to the role of the reviewee in improving the school and their performance but will be led by the appraisee. This will usually take place as part of the annual Performance Development meeting but may, in agreement with appraisee and Line Manager, roll over into the autumn term
- 6.6. It is the responsibility of the reviewee to gather evidence during the year of their development in target areas, and to demonstrate the impact of their work on reaching the OWN Standards level in their ongoing dialogue with their reviewer. It is also their responsibility to seek out training and support, and to read widely to support their improvement.
- 6.7. Throughout the year, there will be regular, ongoing dialogue led by the Line Manager (or agreed nominated alternative). Where appropriate, this may be individually, in teams or in groups. OWN Trust aim is that these meetings will be every 2-3 weeks, but with no formal proforma or records, apart from individual, personal notes that are needed to support the process. The reviewee will provide evidence throughout the year in a format that is agreed with the reviewer. (E.g. achievement of identified termly milestones).
- 6.8. It is the responsibility of the line manager to provide support, encouragement and challenge throughout the year. The line manager should signpost appropriate training and development opportunities and should ensure that the reviewee takes advantage of chances to explore expertise internal and external to the Trust. Line managers should flag up particular successes to School Leaders so that these can be shared and celebrated.
- 6.9. The second spring Performance Development meeting should review progress towards targets and offer any appropriate challenge and support. Evidence will be provided via a presentation from the appraisee (minimal – e.g. 2 PowerPoint slides or format agreed with the appraisee and commensurate with the role).
- 6.10. Regular and systematic leadership monitoring of overall academy, leadership and teaching standards will flag up any colleagues who are not meeting requirements, and who may require informal or formal intervention as per the Trust capability policy. Once a colleague is placed on informal or formal support, the Performance Development process will pause, and

automatic payment increments will stop for the duration of the process for that academic year. For example, if a colleague is placed on informal or formal support in December, they will be unlikely to receive an increment the following autumn. The exception to this would be a dramatic improvement in performance against the relevant standards.