



# How to create the right environment for performance management as an inclusive process

Before using these sheets, please make sure that you are familiar with the revised performance management arrangements for teachers and head teachers as set out in the Regulations, the Guidance and the model performance management policy prepared by the Rewards and Incentives Group (RIG). You can refer to these on the TDA website at [www.tda.gov.uk/pm](http://www.tda.gov.uk/pm)

**References:** *Regulation 21 and the Guidance sections 1.5, 1.7, 4.11 and 4.15 are especially relevant to discussions about performance management as a whole school process.*

## Key points

It is vital that the development and implementation of the revised performance management arrangements are viewed as a whole school process:

- a clear sense of ownership should be promoted by engaging everyone fully in the process
- parameters should be set to ensure parity of treatment, fairness and consistency
- principles and practices of performance management should be fully integrated into whole school activities within an overarching, coherent framework.

## Considerations

Schools will need to put mechanisms in place to make these aspirations a reality by making sure, for example, that:

### *Engagement in the process*

- all staff are informed about and understand the performance management process and their role in it
- consultation with all teachers, including, for example, part-time staff, is both widespread and meaningful
- a proper rationale is provided if views which emerge during consultation are rejected
- the governing body seeks to agree a performance management policy with representatives of recognised unions in the light of the outcomes of consultation
- consultation leads within a reasonable timescale to clear decisions
- provision is in place for upward feedback and communication, with confidential channels for colleagues to use to make suggestions and raise innovative ideas

### *Fairness and consistency*

- all reviewers are prepared and supported in carrying out reviews and classroom observation consistently and in line with the provisions of the performance management policy
- judgments are securely based and solidly rooted in evidence
- teachers who provide support are fully aware of their role
- appropriate moderation provisions have been determined
- monitoring and evaluation arrangements are clearly understood and applied consistently
- appeals provisions are clearly specified

### *Integration into whole school activities*

- there are clear links between performance management and budget-planning processes:
  - budgets are planned on the assumption that all teachers will meet their performance criteria and any relevant pay progression criteria
  - the school budget-setting process is informed by individual training and development needs identified in the performance management planning meeting
- objectives reflect the school improvement plan
- the school's continuing professional development (CPD) plan is not static and can take account of individual needs that emerge from the performance management process
- evidence collected from observation is used appropriately to inform other whole school processes
- there are clear links between school self-evaluation, performance management and quality assurance processes.

**Further information on performance management at [www.tda.gov.uk/pm](http://www.tda.gov.uk/pm)**