



Performance Management Policy (Appraisal)

This procedure has been written by adopted and adapting the FusionHR model policy (August 2026).

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School Business Manager:		Date:	28/09/2026
Headteacher:		Date:	28/09/2026
Chair of Governors		Date:	05/10/2026

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1. Statement of intent

- 1.1. Maintained schools are required, under the Education (School Teachers' Appraisal) (England) Regulations 2012, to have an appraisal policy in place
- 1.2. This policy sets out the framework for a clear and consistent assessment of the performance of all staff, including the headteacher, and for supporting their development within the context of Amwell View School's plan for improving its educational provision and the standards expected of all staff. It also sets out the arrangements that apply when a staff member falls below the expected level of competence.
- 1.3. This policy applies to the headteacher and to all staff employed by Amwell View School, except: those on a contract of less than one term; teachers undergoing statutory induction as an Early Career Teacher (see the statutory ECT induction arrangements); and those subject to the formal capability procedure (see the Capability Policy).
- 1.4. The appointed appraiser must apply this procedure fairly and consistently, taking a robust approach while minimising the impact on workload for staff, managers, leaders and the Governing Body, which is committed to ensuring consistency of treatment and fairness in how performance management operates.

2. Policy aims

- 2.1. This policy aims to: enhance the quality of learning and teaching; enhance staff professional development; meet the requirements of Amwell View School's improvement plan; advance equality of opportunity and encourage colleagues from underrepresented groups to pursue the opportunities available to them; support the school in achieving its strategic goals; deliver a well-rounded, effective service to pupils and the community through well-trained, motivated and competent staff; proactively support staff experiencing difficulty in meeting the standard expected of them; and address any concern raised about a staff member's performance.
- 2.2. Performance management should also: recognise achievement and consolidate good practice; support career planning and development requests; help prioritise workload; identify staff development needs and improve their planning and delivery; and promote professional relationships and dialogue within Amwell View School.

3. Management process

- 3.1. Throughout Amwell View School, the performance management process is a supportive and developmental one, designed to ensure all staff have the skills and support they need to carry out their role effectively, and to continue to improve and develop their professional practice.

4. The performance management period

- 4.1. The performance management cycle runs for twelve months, from 1 September to 31 August. A staff member on a fixed-term contract of less than one year will have their performance managed in line with the principles of this policy, with the length of the period determined by the length of their contract, and any objectives set taking into account their contract length and any extended period of leave.



- 4.2. Where a staff member starts part-way through a cycle, the headteacher - or, where the staff member is the headteacher, the Governing Body - will determine the length of their first cycle, with a view to bringing it into line with other staff as soon as possible, and the staff member will be informed of the arrangement.

5. Appointing appraisers

- 5.1. The headteacher will be appraised by the Governing Body, supported by a suitably skilled and/or experienced external adviser appointed by the Governing Body for that purpose.
- 5.2. Teachers will be appraised by other teachers who hold qualified teacher status, are suitably trained, and, preferably, have current or recent teaching experience - except that the headteacher will appraise members of the school's leadership team, and will decide who appraises other teachers and staff. For all other staff, the appraiser will be an appropriate line manager, as determined by the headteacher.
- 5.3. Where a staff member objects to the headteacher's choice of appraiser, their concern will be carefully considered, and, where both possible and appropriate, an alternative appraiser offered.

6. Setting objectives

- 6.1. The headteacher's objectives will be set by the Governing Body panel, after consultation with the external adviser. Objectives for each staff member will be set before, or as soon as practicable after, the start of each appraisal period, and no later than 31 October, and will be specific, measurable, achievable, realistic and time-bound, and appropriate to the staff member's role and experience.
- 6.2. The appraiser and staff member will seek to agree objectives; if this is not possible, the appraiser will determine them, and the staff member may record their disagreement on their appraisal statement, which may be taken into account at the appraisal review. Objectives may be revised where circumstances change - for example, where a staff member goes on maternity leave or undergoes extensive medical treatment. Objectives that are achieved will contribute to the school's plans for improving its educational provision and the education of its pupils, and will give the staff member a clear focus for their professional development, so they remain up to date with current methodology, technology, education research and statutory guidance.
- 6.3. This will be supported by: quality-assuring all objectives against the school improvement plan; better learning and development opportunities; improved relationships with pupils, parents, carers and the community; more efficient use of resources; and a better working dynamic.
- 6.4. At the start of each cycle, staff will be told the specific standards against which their performance will be assessed, and will be assessed as meeting those standards unless clear, compelling evidence to the contrary is provided.
- 6.5. Agreed objectives will describe what success looks like. Where a numerical target is used, it will be reasonable in the staff member's circumstances, recognising that factors outside their control may significantly affect success, and will not be set where achieving it is beyond the staff member's control.
- 6.6. A teacher's performance is assessed against their objectives and the relevant standards; the appraiser will set out what they will consider when judging whether



- these have been met. Evidence used must relate directly to the objectives, should be agreed in advance, and should be readily available from day-to-day practice.
- 6.7. Setting too many objectives, or using sub-targets, can cause unreasonable workload and pressure, making objectives harder to achieve; other than in exceptional circumstances, no staff member will normally be given more than three objectives, though the number may vary depending on their difficulty or complexity.
- 6.8. The appraiser will take into account the effect of an individual's circumstances, including any disability, when agreeing objectives - for example, by allowing a reasonable adjustment such as slightly longer to complete a task. Objectives may also be adjusted when a staff member returns from a period of extended absence, to allow them to readjust to their working environment.
- 6.9. The performance management cycle is annual, though it may sometimes be appropriate to set an objective covering more than one cycle; in that case, progress towards the objective will be assessed at the end of the first cycle and recorded in the planning and review statement at the start of the next.

7. Moderation

- 7.1. Amwell View School will operate a system of moderation to ensure all appraisers work to the same standards. The headteacher is responsible for ensuring targets are moderated across the school, so they are consistent between staff with similar experience and responsibility, and for ensuring the appraisal process complies with this policy, the relevant regulations, and equality legislation.
- 7.2. All appraisers will be trained to discharge their role effectively, including conducting performance management reviews, setting objectives, classroom observation, and providing quality feedback. The Governing Body will review the quality assurance process when this policy is reviewed.

8. Reviewing performance

- 8.1. Amwell View School will set out what evidence it will take into account when judging a staff member's performance against the relevant standards and their objectives, decided when the objectives are set at the start of the appraisal process.

Individual Assessment Review

- 8.2. Amwell View School believes that assessment against targets is important in identifying a teacher's strengths and areas for development. Performance will be reviewed on an ongoing basis, evaluating information from a range of sources, not only appraisal meetings, and using methods that do not add to workload where possible.
- 8.3. Staff must first review themselves against the relevant standards, using methods reasonably directed by the headteacher. A performance management meeting with the appraiser will then take place during the review period, considering: progress against previous targets; progress against relevant standards; the Teachers' Standards, where applicable; and any other relevant evidence.

Individual Observation

- 8.4. Amwell View School values observing classroom practice and other responsibilities as a crucial part of assessing performance, conducted in a supportive and cooperative environment. The following will apply: no more than three official



observations per year; no observation exceeding one hour; the focus and timing of each agreed in consultation with the teacher; and observations conducted with professionalism, integrity, courtesy and objectivity, with an accurate and fair report, treated in confidence.

- 8.5. Classroom observation will be carried out by a person with Qualified Teacher Status; the amount and type will depend on the individual and on Amwell View School's needs. In addition to formal observation, the headteacher or another leader with responsibility for standards may carry out a 'drop-in' of no more than 60 minutes to evaluate provision; drop-ins do not form part of the performance management process itself, but may be used where a serious concern arises. A staff member with responsibilities outside the classroom should also expect their performance of those responsibilities to be observed and assessed.

Development and Support

- 8.6. The performance management cycle is a supportive process to guide ongoing professional development. Amwell View School aims to foster a culture in which every teacher takes responsibility for enhancing their teaching through suitable professional development, aligned with both the school's improvement goals and their own evolving professional needs.

Feedback

- 8.7. Staff will receive constructive feedback on their performance throughout the year, and as soon as practicable after an observation or when other evidence comes to light, highlighting strengths as well as any area needing attention. Staff are encouraged to engage in open dialogue with their appraiser and/or line manager about their development.

Assessment Against the Teachers' Standards

- 8.8. A teacher's performance will be evaluated against the relevant standards, having regard to what can reasonably be expected for their specific role. Appraisers should exercise judgement rather than a strict checklist model, and teachers should not routinely be expected to provide evidence that they meet every standard.

9. Staff experiencing difficulties

- 9.1. Where there is a concern about any aspect of a staff member's performance, and they are experiencing difficulty achieving the required standard, the appraiser will meet them formally, giving at least 5 working days' notice and informing them of their right to be accompanied by a trade union representative or workplace colleague.
- 9.2. The meeting will: tell the staff member they will receive informal support because of a performance concern; give clear feedback on the nature and seriousness of the concern; give the staff member the opportunity to comment and discuss it; agree the support to be provided; make clear how, and by when, progress will be reviewed and success measured; set a clear, reasonable improvement timescale of 6-10 school working weeks, adjusted according to the circumstances and support in place; agree a regular (normally weekly) review meeting; and explain the implications and process that will apply if there is no, or insufficient, improvement.
- 9.3. Where the appraiser is satisfied at review that the staff member has made, or is making, sufficient improvement, the performance management process will continue as normal, addressing any remaining issues within it. Where the appraiser considers



the staff member could meet the required standard within an extended period, they may write to the headteacher to request an extension of up to two weeks to support this.

- 9.4. Amwell View School may identify a serious case of persistent failure to meet job expectations or teaching standards, negatively affecting pupils or the wider setting. A teacher must not ordinarily be placed into the capability procedure without first undergoing a period of informal support under this policy.

10. Transition to capability

- 10.1. Where there is a serious concern about a staff member's performance, or insufficient or no improvement has been made during a review period under the process above, the staff member will receive written notification that their performance is below the required standard, inviting them to a transition meeting with the appraiser and the headteacher to decide whether formal capability proceedings should begin, or whether the appraisal process should remain in place. The staff member may be accompanied by a trade union representative or work colleague, and will have at least 5 working days' notice.
- 10.2. The meeting will review progress towards the improvement targets. The appraiser will summarise the concerns; the staff member will have the opportunity to respond and make representations on their performance, targets and progress; and the appraiser will express a view on whether the performance management process should continue, or formal capability proceedings should commence. The headteacher may adjourn the meeting - for example, if further investigation or time to consider additional information is needed - and will then conclude either that there are insufficient grounds to pursue capability, in which case the staff member will continue to be supported under this policy, with a new improvement timescale and review date set, or that capability procedures will commence, in which case the staff member will be told in writing that the performance management process no longer applies and that their performance will be managed under the capability procedure.
- 10.3. Where capability procedures commence, a date will be set for the formal capability meeting, and the staff member will receive written notice of the meeting, the evidence to be relied on, and a copy of the procedure, at least ten working days beforehand. See Amwell View School's Capability Policy.

11. Annual assessment

- 11.1. Each staff member's performance will be formally assessed for each performance management cycle. In assessing the headteacher's performance, the Governing Body must consult the external adviser. This assessment is the end point of the annual process, though performance and development priorities will be reviewed and addressed regularly throughout the year at interim meetings.
- 11.2. The staff member will, as soon as practicable, have access to their performance management report; teachers will receive their report by 31 October, and the headteacher by 31 December. The report will include: details of the staff member's objectives for the cycle; an assessment of their performance against those objectives and the relevant standards; and an assessment of their professional development needs and any action to be taken to address them.
- 11.3. The assessment of performance and development needs will inform planning for the following cycle. Unless the staff member has entered the formal capability procedure, they will automatically be put forward for progression to the next



incremental pay point, up to the maximum of their agreed pay scale. A teacher wishing to apply for consideration for progression through the upper pay range must share their application with their appraiser in accordance with the school's Pay Policy.

12. Appeals

- 12.1. A staff member may comment on their appraisal report, and discussion at this stage may avoid the need for an appeal. They have a right of appeal against any entry in the report; the first line of appeal is to make representations at a meeting with the appraiser, and, if unresolved, the matter will be heard by the Governor Body's Appeals Committee, using school's grievance procedure.
- 12.2. The headteacher will notify any staff member not recommended for pay progression of the date the Governing Body will meet to consider pay recommendations, following which they may exercise their right of appeal, accompanied by a colleague or trade union representative or official. An appeal on pay progression will be dealt with under school's Grievance, Bullying and Harassment Policy.

13. General principles underlying this policy

- 13.1. The appraisal process will be treated confidentially. Only the appraiser's line manager(s) will be given access to an appraisee's statement, on request and only where necessary to discharge their line management responsibility; the appraisee will be consulted on any such request. Gathering evidence for a review will not compromise normal professional relationships, and the appraiser will consult with, and seek the agreement of, the appraisee before seeking information from other colleagues about their work.
- 13.2. This does not override the headteacher and Governing Body need to quality-assure the operation and effectiveness of the appraisal system - for example, the headteacher or an appropriate colleague may personally review all staff members' objectives and appraisal records to check consistency between appraisers, and may wish to be aware of any pay recommendation made.

Definitions

- 13.3. Unless stated otherwise, any reference to 'teacher' in this policy includes the headteacher and senior leaders.

Retention

- 13.4. The Governing Body and headteacher will ensure that all written performance management records are retained securely for six years and then destroyed.

Consistency of Treatment and Fairness

- 13.5. The Governing Body is committed to ensuring consistency of treatment and fairness, and will comply with all relevant equality legislation, including the duty to make reasonable adjustments for a teacher with a disability.

Delegation

- 13.6. The normal rules apply in respect of the delegation of functions by the Governing Body and headteacher.



Grievances

- 13.7. Where a staff member raises a grievance during the appraisal process, the process may be temporarily suspended to deal with the grievance, where this is considered necessary.

Sickness

- 13.8. Where long-term sickness absence appears to have been triggered by the start of monitoring or a formal capability procedure, the case will be dealt with under Amwell View School's Attendance Management Policy, and referred to Occupational Health to assess the staff member's health and fitness for continued employment, and the appropriateness of continuing with monitoring or formal procedures. In some cases, it may be appropriate for these to continue during a period of sickness absence.

14. Monitoring and evaluation

- 14.1. The policy will be reviewed annually, or before if required.
- 14.2. The Governing Body and headteacher will monitor the operation and effectiveness of Amwell View School's performance management arrangements.
- 14.3. The headteacher will report on any appeal or representation made, on an individual or collective basis, on the grounds of alleged discrimination.

15. Related policies and documentation

- 15.1. This policy should be read alongside the school's policies:
- 15.2. Capability Policy
- 15.3. Probation Policy
- 15.4. Grievance, Bullying and Harassment Policy
- 15.5. Attendance Management Policy
- 15.6. Pay Policy
- 15.7. Equal Opportunities and Dignity at Work Policy