Pathway Trust

Performance Review Policy

Policy effective from	1 September 2026
Policy owner	Director of People
Policy applies to	Berrow Church Primary School Burnham-on-Sea Infant School Castle Batch Primary School Charfield Primary School Cherry Garden Primary School Downend School East Huntspill Primary School Lyde Green Primary School Mangotsfield School Marlwood School Pawlett Primary School Priory Community School Severn Beach Primary School St Andrew's Church Junior School St Anne's Church Primary School The Castle School The King Alfred School Tortworth Primary School West Huntspill Primary School Worle Community School Pathway Partnership Teams
Policy changes since last version	New policy

1. Introduction

1.1 Pathway Trust is committed to providing high quality teaching and learning. Through our workforce we aim to provide opportunities for all of our pupils, whatever their ability. Each employee will therefore be given support to ensure that they have the skills they need to carry out their role, help them continually improve their performance and develop to their full potential which will in turn help improve outcomes for our young people.

1.2 Having an effective performance and review process in place is one of the ways we can support our employees and deal with performance matters as they arise. This involves carrying out performance reviews, providing development opportunities and operating a fair and reasonable capability process.

1.3 This policy has been developed to comply with current legislation including the Education (School Teachers' Appraisal) (England) Regulations 2012 (the Appraisal Regulations), that apply to teachers in all maintained schools. Pathway has decided to follow the principles of these Regulations in developing and implementing this policy. This policy will also apply to support staff employed within the trust, to ensure consistency across all employees.

1.4 This policy does not form part of any employee's contract of employment and may be amended at any time following consultation.

1.5 Employees who transfer to the trust on their pre-existing terms and conditions of employment by way of a TUPE transfer may have enhanced contractual entitlements. Where this is the case, those enhanced contractual entitlements will continue to apply, unless superseded by subsequent arrangements.

1.6 The trust is committed to ensuring any policy and procedure does not disadvantage any individual with protected characteristics in line with Equality Act 2010. All policies and procedures are checked to ensure they do not discriminate either directly or indirectly or present any barriers.

2. Scope and purpose of this policy

2.1 The purpose of this policy is to set out the framework for a clear and consistent assessment of the overall performance of all employees, and for supporting their development within the context of the school/trust plans for improving educational provision and performance, and the set standards expected of each employee. This policy links to the Capability Policy and Pay Policy.

2.2 This trust regards the Department for Education Teachers' Standards as the baseline of expectations for the professional practice and conduct of teachers, from the point of qualification.

2.3 In implementing this policy, the trust will ensure that performance and review is managed in a way that avoids increased workload for all parties concerned, for example, reviewing the number and frequency of meetings and ensuring the process for collecting evidence is always proportionate.

2.4 This policy applies to all employees of the trust, including leaders, teachers and support staff, and centrally employed staff within the trust except those on contracts of less than one term, those undergoing statutory induction (i.e. Early Career Teachers -ECTs) and those who are subject to the Capability Policy. It does not apply to agency or casual workers, contractors, consultants or any self-employed individuals.

2.5 Employees within a probationary period are, in addition, subject to the trust's Probationary Policy. On successful completion of the probationary period, performance and review will be covered by this policy.

2.6 Where an employee is not covered by this policy as set out in 2.4 and 2.5 above, then performance will be managed through regular supervision, feedback and any other applicable trust policies.

3. The performance and review cycle

3.1 The cycle will run for twelve months from September to August.

3.2 Employees who are employed on a fixed term contract of less than one year but more than one term will have their performance managed in accordance with the principles underpinning this policy. The length of the period and teacher's objectives will be determined by the duration of their contract.

4. Appointing reviewers

4.1 The Headteacher/Director will decide who will appraise all employees with the exception of the Chief Executive who will be appraised by a subgroup of no more than 3 trustee.

4.2 Employees will be notified of who their reviewer will be, before or as soon as practicable after the start of each performance and review period.

5. Setting objectives

All employees

5.1 Objectives for each employee will be set before or as soon as practicable after the start of each period. The objectives will be Specific, Measurable, Achievable, Realistic and Time-bound (SMART) and will be fair, reasonable and appropriate to their role and level of experience. The reviewer and appraisee will seek to agree on the objectives but, if that is not possible, the reviewer will determine the objectives. The employee can make a comment on their appraisal should they object to an objective set. The trust has a duty to have a regard to the work life balance of all employees and the objectives will reflect this.

5.2 Objectives and performance discussions for teachers will not be based on teacher generated data and predictions, or solely on the assessment data for a single group of pupils. Objectives can be set in relation to robust assessment data where required, however, these will not be used in isolation and other factors will also be considered when making decisions about pay progression.

5.3 Objectives may be revised if circumstances change during the performance and review period for example in the event of absence or change or role.

5.4 The objectives set for each employee will, if achieved, contribute to school/trust plans for improving educational provision and performance and improving the education of pupils. Objectives should also have a strong focus on professional development to ensure up-to-date methodologies, technologies and educational research are being utilised. The Headteacher/Director of the school/trust together with the senior leadership team will be responsible for quality assuring objectives.

5.5 The performance of each employee will be assessed against the relevant standards, which contribute to our aims and provide a guide for employees in their relevant role. All teachers must be assessed against the set of standards contained in the Teachers' Standards, with the exception of those who are qualified teachers by virtue of holding and maintaining Qualified Teacher Learning and Skills (QTLS) status, for whom it is for the Headteacher to decide which standards are most appropriate.

6. Reviewing performance

6.1 Our performance and review process is supportive and is used to inform continuing professional development which improves performance. The trust encourages a culture in which all employees take responsibility for improving their performance in their role and extending their depth of knowledge through appropriate professional development. Agreed training and professional development will be linked to school/trust improvement priorities and where possible, to the ongoing professional development needs and priorities of individuals. We are committed to supporting appropriate and reasonable development which not only assists the employee in their role but also leads to improvements in performance across the school/trust.

6.2 The process will also be used to determine decisions on pay progression for the teachers on the leadership pay range and also support applications for teachers applying to move to the upper pay range or to support progression within the upper pay range. Teachers will be awarded annual pay progression of one point within the main pay range automatically, unless there are significant concerns.

6.3 Employees will receive constructive feedback on their performance throughout the year which will focus on particular areas of strength as well as any areas that require further development.

6.4 Feedback will also be sought from relevant employees within the school/trust for example, a teacher may be asked to provide feedback on a teaching assistant who works with them.

6.5 Where there are concerns about any aspects of an employee's performance the reviewer will meet the appraisee to:

- Give clear feedback about the nature and seriousness of the concerns
- Give the appraisee the opportunity to comment and discuss the concerns
- Find out if there are any issues (both in or outside of work) that are affecting their performance that the reviewer can assist with or provide support

- Set clear objectives for the required improvements and how these can be achieved
- Agree any support (for example coaching, mentoring, training, structured observations, observing others in a similar role etc), that will be provided to help address those specific concerns
- Make clear how, and by when, the reviewer will review progress either by setting new and clear objectives for required development which will be assessed during the review period or by revising current objectives, allowing sufficient time for improvement; the amount of time for this should reflect the seriousness of the concerns. This will be an informal review period and will be confirmed in a Support Plan.
- Explain the implications and process if no - or insufficient - improvement is made during the informal review period for example, impact on pay progression and potential move to formal capability.

6.6 This meeting can happen at any time during the period. It is designed to be a supportive meeting to address issues early to avoid the matter escalating, giving the employee the opportunity to improve. At the meeting, the reviewer will present evidence collected that indicates that the employee's performance is not up to the required standard. Employees will be given the option to bring an official trade union representative or work colleague to this meeting if they wish and if one is available. It may not be possible for rearrangements to be made to the time and date of this meeting to enable a companion to attend. Although this is part of an informal process, a note of the meeting will be made and a copy given to the employee so that they are clear about the support they will be given, what improvements need to be made and the timescales.

6.7 Reviews and timeframes will be agreed; the length will be determined by the reviewer based on the individual circumstances of the situation but it should not be unduly long (normally 6 weeks) During the informal review period, regular meetings should take place to ensure progress is being made.

6.8 At the end of this informal review period when progress is reviewed, if the reviewer is satisfied that the employee has made, or is making sufficient improvement, the performance and review process will continue as normal, with any remaining issues continuing to be addressed through that process. If performance is improving and the reviewer feels that further time is required to monitor improving performance, the reviewer can decide to extend the informal review period but it should not be unduly long (normally a further 4 weeks). If no or insufficient improvement is being made, then the process set out below (section 9) should be followed. It will be for the reviewer to decide which procedure will be followed.

7. Evidence

Evidence supports the performance and review process. The range and level of evidence collected for reviews and pay determination purposes will always be proportionate and minimise workload.

All employees

7.1 During the period, each employee has a responsibility for gathering evidence of their progress throughout the year in order for them to identify any particular strengths or areas for further development in relation to the objectives set, at the interim and annual review meetings. The reviewer will then record the discussion on this evidence and make an assessment in the performance and review report.

Teachers

7.2 In addition, a range of evidence should be available to the reviewer on a teacher's performance as part of the school/trust quality assurance processes. Evidence (anonymised where appropriate) may include but is not limited to:

- Work scrutiny
- Planning scrutiny
- Learning walks
- Standardised progress data
- Progress of individuals/groups
- Evidence of meeting Standards
- Assessment of TLR
- Lesson observations (including "drop ins")

8. Annual review

8.1 Performance and development priorities will be reviewed and addressed throughout the process and an interim meeting may take place at the mid-point of the cycle (Term 4) to review performance and progress towards objectives. Any concerns will be noted and an appropriate support plan will be put in place for the remainder of the cycle. The support plan will set out what improvement is required and what support will be provided.

8.2 Each employee's performance will be formally assessed in respect of each performance and review period. An annual assessment is the end point to the annual cycle and will formally assess each employee's performance in respect of that cycle. The employee will receive a written performance and review report as soon as practicable afterwards and have the opportunity to comment on it in writing. The report will be a summary of the performance during the year and set out what the employee's development needs are for the next year. In particular the report will include:

- Details of the objectives for the performance and review period in question
- An assessment of performance of their roles and responsibilities against their objectives and any relevant standards

- An assessment of training and professional development needs and identification of any action that should be taken to address them
- A recommendation on pay (where applicable)

8.3 The assessment of performance and of professional development needs from each individual review will inform the planning process for the following period for the school/trust.

8.4 Annual reviews for all employees (including Headteachers and trust leaders) should take place by 31 October.

9. Transition to Capability

Performance and review is an ongoing process. If an employee demonstrates underperformance and has not responded to support provided within the process, the employee will be notified in writing that the performance and review system will no longer apply and that their performance will be managed under the Capability Policy, and they will be invited to a formal capability meeting.

10. General principles underlying this policy

Confidentiality

10.1 The process will be treated confidentially. However, the desire for confidentiality does not override the need for the Headteacher/Director to quality-assure the operation and effectiveness of the performance and review system. The Headteacher/Director, in conjunction with the leadership team, is responsible for reviewing objectives and written performance and review records, in order to check consistency of approach and expectation between different reviewers.

Consistency of treatment, fairness and respect

10.2 The trust is committed to ensuring consistency of treatment, fairness and respect. It will abide by all relevant equality legislation, including the duty to make reasonable adjustments for disabled employees. The Board of Trustees is aware of the guidance on the Equality Act 2010 issued by the Department for Education.

10.3 We will not tolerate abusive or insulting behaviour from anyone taking part in the performance and review process, and any such behaviour will be treated as potential misconduct.

Monitoring and Evaluation

10.4 The Headteacher/Director will monitor the operation and effectiveness of the performance and review arrangements. In developing, applying and evaluating this policy we will monitor the impact on different groups of people with protected characteristics in line with the trust's Equality and Diversity policy and our Workforce Privacy Notice. This will ensure that what we do is done fairly.

Retention and data protection

10.5 The Headteacher/Director will ensure that all written performance and review records are retained in a secure place. As part of the application of this policy, the school/trust may collect, process and store personal data in accordance with our data protection policy. We will comply with the requirements of Data Protection Legislation (being (i) the General Data Protection Regulation ((EU) 2016/679) (unless and until the GDPR is no longer directly applicable in the UK) and any national implementing laws, regulations and secondary legislation, as amended or updated from time to time, in the UK and then (ii) any successor legislation to the GDPR or the Data Protection Act 1998, including the Data Protection Act 2018). Records will be kept in accordance with our Privacy Notice, our Retention and Destruction Policy and in line with the requirements of Data Protection Legislation.

11. Review of policy

This policy is reviewed annually by trust in consultation. We will monitor the application and outcomes of this policy to ensure it is working effectively.