

DIY Guide Guidance for School Governors

Governors Role in Performance Management

(Governor training is regularly held to cover both the theory and practice of this area)

Ofsted expect Governors to

- understand how the school makes decisions about teachers' salary progression and performance
- performance manage the headteacher rigorously

The Governing Body has responsibility for establishing the school's Appraisal Policy and for ensuring it is implemented. A model policy is provided by Bracknell Forest and having taken account of any changes to the policy, governors should **approve the policy annually**.

The model policy states that: - **The Headteacher will provide the governing body with a written report on the operation of the school's appraisal policy annually**. Governors should not be discussing named staff performance management targets although in the light of the expectations detailed in the Ofsted handbook, then it would be beneficial for governors to see anonymised example objectives. Governors are also expected to understand how the school makes decisions about teachers' salary progression which is normally done through the pay committee. **(See Governors role in Pay DIY Guide)**

The Headteacher will also report on whether there have been any appeals or representations on the grounds of alleged discrimination. The governing body and Headteacher will ensure that all written appraisal records are retained in a secure place for six years.

Governing bodies must appoint 2 or 3 governors to annually **review the Headteacher's performance** by the 31st December where they also need the advice of an External advisor. They generate a planning and review statement that is retained confidentially for 6 years.

Practical Tips in conducting effective Headteacher performance management.

Governors should practically manage this process by arranging a meeting in the autumn term which includes the External advisor. The Headteacher will provide self-evaluation summary evidence in relation to last year's targets. This will demonstrate what progress has been made and the impact that has been achieved, although governors will have studied much of the detail already as part of normal governing body meetings.

It is a good idea if governors examine the evidence before the meeting and also have considered areas for possible objectives. This information allows all parties to be better prepared so that the review meeting can run more efficiently and productively.

Chairs of Governors can sit on this panel but it is good practice for them NOT to chair the panel and for there to be two further governors (3 in total), to ensure objectivity. However if the chair is on the panel then another governor would need to listen the Headteacher's appeal should that be necessary. (HR will also give support)

It is important that the review meeting is held during the day where interruptions will not occur and in an environment that is conducive to working together for the benefit of improving the school for the children. Achievements should be celebrated and when **reviewing last year's objectives**, governors need to discuss the context and not just view it as a pass or fail situation. They also need to **take account of overall performance** using the Headteacher's Standards. <https://www.gov.uk/government/publications/national-standards-of-excellence-for-headteachers>

A pay recommendation will need to be made to the pay committee by December 31st and it is recommended that one member of the performance management panel also sits on the pay committee.

Objectives are then set for the next year - in the interest of the governing body's responsibility for the Headteacher's work life balance, about 3 or 4 objectives specifying the

time frame, criteria for measurement, arrangements for monitoring and any specific training or professional development required.

Objectives should contribute to pupil progress and be based on the school development plan. They should be sufficiently challenging but not impossible and it is important that they are agreed upon by all parties and not enforced by the governors! **A draft planning and review statement outlining the objective details and also making any pay recommendation should be issued as soon as possible after the meeting.**

It is also good practice to **timetable in review meetings in the spring and summer term**, although the external advisor would not be present for these. This enables the performance management panel to hear from the Headteacher the progress that has been made thus far. In addition should a situation outside their control have arisen, the objectives could then be amended if that is appropriate.

Review and interim meetings are not clerked although a panel member should take notes that are shared only with the panel and the Headteacher.

Although the process is confidential to the Headteacher and the panel, the chair of the panel should annually report to the governing body that the review and setting of objectives has taken place and that interim meetings are scheduled for Spring and Summer terms. This demonstrates accountability; "Ofsted expect Governors to performance manage the headteacher rigorously". The Headteacher may choose at this stage to share some or all of their objectives.

Useful Documents are:-

Implementing your schools approach to pay

<https://www.gov.uk/government/publications/reviewing-and-revising-school-teachers-pay>

NGA Knowing your School, Governors and Staff Performance

<http://www.nga.org.uk/Guidance/Holding-your-school-to-account/Monitoring-Performance/Knowing-Your-School.aspx>

10 features of effective Headteacher performance management. NCTL document Page 20

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/307363/HTPM_research_brief.pdf