Brightwalton C. E. Primary School

Performance Development Policy

"…let your light shine before others..." Matthew 5:16

This policy is due for review on October 2028

Date of last review: October 2025

Date of next review: October 2028

Signed off by: S Slade Headteacher

Performance Development Policy for teaching staff at Brightwalton C of E Primary School

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1. Purpose

This policy establishes the framework for performance development for teaching staff at Brightwalton C of E Primary School. The purpose is to ensure that all staff have clear, meaningful goals aligned with our school's vision—"Shining Light"—and values of Service, Perseverance, Wisdom, Friendship, and Trust. This cycle supports professional growth, encourages collaboration, and fosters a high-quality learning environment.

2. Scope

This policy applies to all teaching staff. A separate but parallel cycle is detailed for support staff, recognising their unique contributions and their direct support under the guidance of their teaching Head teacher. The teacher's

3. Objectives

- To establish a structured, supportive, and continuous performance development cycle.
- To provide timely and constructive feedback and professional development.
- To ensure that teachers' personal development aligns with our school's commitment to high-quality, inclusive education for all pupils.
- To underpin expectations and support development of quality first teaching practice as detailed in the teacher's handbook.

Timetable of Key Meetings and Activities for Teaching Staff

Meeting/Activity	Purpose	Timing
1. First Pupil Progress Meeting	Review pupil outcomes and align with initial staff goals, identifying support areas.	October
2. Goal Setting Meeting	Set individual goals aligned with school values and development priorities.	October (following pupil progress and starting data point).
3. CPD Planning Session	Plan Continuous Professional Development (CPD) aligned with each staff member's role and goals.	November
4. Second Pupil Progress Meeting and data drop	Evaluate pupil outcomes and make targeted interventions if necessary.	Mid-January
5. Mid-Year Review	Conduct a formal review of progress towards goals and adjust where needed.	Late March
5. 3rd Pupil Progress Meeting and data drop	Evaluate pupil outcomes and make targeted interventions if necessary.	Late March

Meeting/Activity	Purpose	Timing
6. Progress review linked to data: final Performance Review	Summative evaluation of performance and development achievements, goal completion, and feedback; set preliminary goals for next year.	Early July/ September (meeting to be before October)

Detail of Performance Development Cycle for Teachers

The performance development cycle includes seven key stages. All meetings are scheduled and recorded to ensure consistency and accountability:

1. **First Pupil Progress Meeting (September - November)**
    - **Purpose:** Teachers and Head teacher review pupil outcomes, identify initial support areas, and discuss how these align with staff goals.
    - **Outcome:** Adjustments to teaching practices are implemented based on pupil data, setting a strong foundation for further goal-setting.
2. **Goal Setting Meeting (November)**
    - **Purpose:** Teachers meet with Head teacher to set individual, values-aligned goals based on pupil progress and starting data points. Goals should be specific, measurable, achievable, relevant, and time-bound (SMART).
    - **Focus Areas:** Goals are tailored to reflect key areas such as pupil progress, subject mastery, inclusive classroom practices, and personal professional development.
3. **CPD Planning Session (November)**
    - **Purpose:** Teachers and managers create an individual CPD plan, focusing on skills and knowledge necessary for goal achievement. This includes access to workshops, Professional Learning Communities (PLCs), or specific training aligned with development goals.
4. **Second Pupil Progress Meeting and Data Drop (Mid-January)**
    - **Purpose:** A mid-point review where teachers and Head teacher evaluate pupil outcomes and discuss necessary adjustments or targeted interventions.
    - **Focus:** Using data-driven assessment to refine teaching strategies, identify gaps, and address any additional support needs.
5. **Mid-Year Review (Late March)**
    - **Purpose:** Conduct a formal mid-year review to assess progress toward initial goals, reflecting on teaching and learning adjustments, and provide additional support if needed.
    - **Outcome:** Documented progress and updated goals or strategies as necessary to support teaching efficacy.
6. **Third Pupil Progress Meeting and Data Drop (Late March)**
    - **Purpose:** Review updated pupil outcomes to inform targeted teaching interventions for the latter part of the year.
    - **Focus:** Data-led discussions focus on ensuring all pupils are on track and making the expected progress.

7. **Final Performance Review Linked to Data (Early July/ September no later than October)**
    - **Purpose:** A summative meeting to review overall performance achievements, discuss goal completion, and provide formal feedback. Teachers also set preliminary goals for the following academic year.
    - **Outcome:** Completion of a formal evaluation report and a preliminary goal-setting document, supporting continuity into the next performance development cycle.

Roles and Responsibilities

- **Performance Managers (Headteachers and Senior Staff):** Facilitate meetings, support goal setting, provide timely feedback, and ensure access to relevant CPD and resources.
- **Teachers:** Engage proactively in the performance cycle, reflect on their practice, and implement feedback and training to enhance pupil learning outcomes.

Monitoring and Evaluation

The Headteacher and Senior Leadership Team (SLT) will review the effectiveness of this performance development cycle annually. Adjustments will be made as necessary to meet the evolving needs of staff and pupils, ensuring alignment with school objectives and fostering a culture of continuous improvement.

https://assets.publishing.service.gov.uk/media/61b73d6c8fa8f50384489c9a/Teachers__Standards_Dec_2021.pdf

Department for Education

Teachers' Standards

PREAMBLE

Teachers make the education of their pupils their first concern, and are accountable for achieving the highest possible standards in work and conduct. Teachers act with honesty and integrity; have strong subject knowledge, keep their knowledge and skills as teachers up-to-date and are self-critical; forge positive professional relationships; and work with parents in the best interests of their pupils.

PART ONE: TEACHING

A teacher must:

1 Set high expectations which inspire, motivate and challenge pupils

- establish a safe and stimulating environment for pupils, rooted in mutual respect
- set goals that stretch and challenge pupils of all backgrounds, abilities and dispositions
- demonstrate consistently the positive attitudes, values and behaviour which are expected of pupils.

2 Promote good progress and outcomes by pupils

- be accountable for pupils' attainment, progress and outcomes
- be aware of pupils' capabilities and their prior knowledge, and plan teaching to build on these
- guide pupils to reflect on the progress they have made and their emerging needs
- demonstrate knowledge and understanding of how pupils learn and how this impacts on teaching
- encourage pupils to take a responsible and conscientious attitude to their own work and study.

3 Demonstrate good subject and curriculum knowledge

- have a secure knowledge of the relevant subject(s) and curriculum areas, foster and maintain pupils' interest in the subject, and address misunderstandings
- demonstrate a critical understanding of developments in the subject and curriculum areas, and promote the value of scholarship
- demonstrate an understanding of and take responsibility for promoting high standards of literacy, articulacy and the correct use of standard English, whatever the teacher's specialist subject
- if teaching early reading, demonstrate a clear understanding of systematic synthetic phonics
- if teaching early mathematics, demonstrate a clear understanding of appropriate teaching strategies.

4 Plan and teach well structured lessons

- impart knowledge and develop understanding through effective use of lesson time
- promote a love of learning and children's intellectual curiosity
- set homework and plan other out-of-class activities to consolidate and extend the knowledge and understanding pupils have acquired
- reflect systematically on the effectiveness of lessons and approaches to teaching
- contribute to the design and provision of an engaging curriculum within the relevant subject area(s).

5 Adapt teaching to respond to the strengths and needs of all pupils

- know when and how to differentiate appropriately, using approaches which enable pupils to be taught effectively
- have a secure understanding of how a range of factors can inhibit pupils' ability to learn, and how best to overcome these
- demonstrate an awareness of the physical, social and intellectual development of children, and know how to adapt teaching to support pupils' education at different stages of development
- have a clear understanding of the needs of all pupils, including those with special educational needs; those of high ability; those with English as an additional language; those with disabilities; and be able to use and evaluate distinctive teaching approaches to engage and support them.

6 Make accurate and productive use of assessment

- know and understand how to assess the relevant subject and curriculum areas, including statutory assessment requirements
- make use of formative and summative assessment to secure pupils' progress
- use relevant data to monitor progress, set targets, and plan subsequent lessons
- give pupils regular feedback, both orally and through accurate marking, and encourage pupils to respond to the feedback.

7 Manage behaviour effectively to ensure a good and safe learning environment

- have clear rules and routines for behaviour in classrooms, and take responsibility for promoting good and courteous behaviour both in classrooms and around the school, in accordance with the school's behaviour policy
- have high expectations of behaviour, and establish a framework for discipline with a range of strategies, using praise, sanctions and rewards consistently and fairly
- manage classes effectively, using approaches which are appropriate to pupils' needs in order to involve and motivate them
- maintain good relationships with pupils, exercise appropriate authority, and act decisively when necessary.

8 Fulfil wider professional responsibilities

- make a positive contribution to the wider life and ethos of the school
- develop effective professional relationships with colleagues, knowing how and when to draw on advice and specialist support
- deploy support staff effectively
- take responsibility for improving teaching through appropriate professional development, responding to advice and feedback from colleagues
- communicate effectively with parents with regard to pupils' achievements and well-being.

PART TWO: PERSONAL AND PROFESSIONAL CONDUCT

A teacher is expected to demonstrate consistently high standards of personal and professional conduct. The following statements define the behaviour and attitudes which set the required standard for conduct throughout a teacher's career.

- Teachers uphold public trust in the profession and maintain high standards of ethics and behaviour, within and outside school, by:
  - treating pupils with dignity, building relationships rooted in mutual respect, and at all times observing proper boundaries appropriate to a teacher's professional position
  - having regard for the need to safeguard pupils' well-being, in accordance with statutory provisions
  - showing tolerance of and respect for the rights of others
  - not undermining fundamental British values, including democracy, the rule of law, individual liberty and mutual respect, and tolerance of those with different faiths and beliefs
  - ensuring that personal beliefs are not expressed in ways which exploit pupils' vulnerability or might lead them to break the law.
- Teachers must have proper and professional regard for the ethos, policies and practices of the school in which they teach, and maintain high standards in their own attendance and punctuality.
- Teachers must have an understanding of, and always act within, the statutory frameworks which set out their professional duties and responsibilities.

The Teachers' Standards can be found on the GOV.UK website: https://www.gov.uk/government/publications/teachers-standards

Detailed Support Staff Development Cycle and Guidance for Teachers as Performance Managers

Meeting/Activity	Purpose	Timing
1. Initial Goal Setting and Planning Meeting	Establish role-specific goals aligned with school needs and the individual's responsibilities.	November
2. CPD and Role Development Planning	Identify training and development needs; ensure role-specific CPD opportunities.	November
3. Mid-Year Review	Review progress towards goals and adjust responsibilities or support if necessary.	Before Easter Holidays
4. Final Performance Review	Summative review of performance, feedback on achievements, and preliminary goal-setting for the following year.	Early July

1. Initial Goal Setting Meeting (Early October)

- **Objective for Support Staff:** Establish clear, role-specific goals that reflect the support staff member's contributions to classroom activities, pupil engagement, and their alignment with school values.
- **Guidance for Teachers/ Line managers (Performance Managers):**
    - **Preparation:** Review the initial goals and outcomes established for students and classroom priorities during your own goal-setting meeting.
    - **Goal Setting:** Guide support staff in setting two to three clear, achievable goals. Examples might include:
        - Enhancing support for specific pupils identified in pupil progress meetings.
        - Assisting with classroom routines that contribute to an inclusive, well-managed environment.
        - Developing skills in specific areas such as behaviour management or supporting pupils with special educational needs (SEND).
    - **SMART Goals:** Ensure each goal is Specific, Measurable, Achievable, Relevant, and Time-bound. Encourage support staff to aim for practical improvements that will support the pupils and the classroom.
    - **Documentation:** Record the goals in a development plan and ensure the support staff member understands their responsibilities and expectations.

2. CPD Planning (November)

- **Objective for Support Staff:** Ensure access to role-specific professional development resources to build skills directly relevant to their duties.
- **Guidance for Teachers (Performance Managers):**

- **Identify Training Needs:** Consider the support staff's specific goals and identify CPD opportunities that will support their achievement. CPD topics might include classroom management, pupil engagement, behaviour strategies, or SEND support.
- **Create a CPD Plan:** Work collaboratively with the support staff to outline key development activities. For example:
    - Workshops on supporting literacy or numeracy in small groups.
    - Training on school behaviour policies and positive reinforcement techniques.
    - Mentorship sessions with experienced support staff or relevant professionals.
- **Scheduling and Accountability:** Confirm with support staff when and how these activities will be undertaken. Encourage them to reflect on what they learn and apply it practically within the classroom.

3. Mid-Year Review (Late March)

- **Objective for Support Staff:** Review progress on established goals and provide an opportunity to discuss challenges, successes, and any adjustments to responsibilities.
- **Guidance for Teachers (Performance Managers):**
    - **Preparation:** Prior to the review meeting, observe the support staff's work with pupils and assess progress toward goals. Review any feedback from your own mid-year review and consider how it might relate to their role.
    - **Discussion Points:** Structure the conversation around each goal, discussing:
        - **Progress Made:** Acknowledge achievements and note any areas where support staff have excelled.
        - **Areas for Improvement:** Provide constructive feedback, suggesting specific ways they might adjust their approach or focus on specific skills.
        - **Adjustments to Goals or Duties:** If necessary, make reasonable adjustments to goals or daily responsibilities to better align with classroom needs.
    - **Documentation and Next Steps:** Document the outcomes of the review, outlining any adjustments and additional support that may be required. Schedule regular check-ins to support ongoing development and accountability.

4. Final Performance Review (Early July)

- **Objective for Support Staff:** Summative evaluation of performance achievements, goal completion, and discussion of preliminary goals for the next academic year.
- **Guidance for Teachers (Performance Managers):**
    - **Preparation:** Review the support staff member's progress towards each goal, along with any feedback from pupils, colleagues, or classroom observations.
    - **Summative Review:** Recognise successes and provide constructive feedback on areas for continued improvement. Structure feedback around key areas such as:
        - How effectively they contributed to classroom management and pupil engagement.
        - Their development in supporting pupils with SEND or other targeted needs.
        - Their ability to maintain the school's values in daily interactions with pupils.

- **Goal Setting for Next Year:** With the support staff member, outline preliminary goals for the upcoming year. Consider how their growth this year can be built upon, and any new skills or responsibilities that might be added.
- **Documentation and Reflection:** Finalise the development cycle documentation, detailing achievements, areas for growth, and new preliminary goals. Encourage the support staff to reflect on the year's development and prepare for the next cycle.

Expectations for Teachers as Performance Managers

To support you in your role as a performance manager for support staff, here is a breakdown of responsibilities:

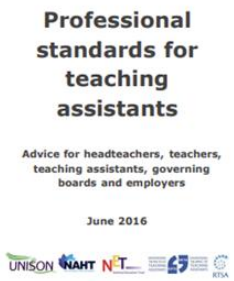
- **Preparation and Observation:** Before each meeting, observe the support staff's interactions with pupils and their contributions to the classroom. Gather feedback and insights from your own performance reviews that can be aligned with the support staff's goals.
- **Guiding Goal-Setting and Feedback:** Use your own experience and goals to inform support staff goals, helping them understand how their role supports the broader classroom and school objectives.
- **Documenting Progress:** Maintain a record of each meeting, noting progress, adjustments, and outcomes. This documentation will support reflective practice and help structure future cycles.
- **Providing Constructive Feedback:** Use positive reinforcement while also identifying clear, practical areas for improvement. Aim to empower support staff to grow in their roles and support student outcomes effectively.
- **Encouraging Reflection:** Throughout the cycle, encourage support staff to reflect on their progress, what they've learned, and how they can further improve. Regular check-ins outside formal reviews can provide ongoing support and maintain accountability.

Monitoring and Review

The Headteacher and Senior Leadership Team (SLT) will annually review the effectiveness of the support staff development cycle. Teachers acting as performance managers will be encouraged to provide feedback on the cycle, supporting continuous improvement in performance management and ensuring that support staff can contribute effectively to the school's mission. Adjustments will be made as needed to reflect the changing needs of the school and to continue developing a cohesive, supportive school environment.

Policy Review

This policy is reviewed annually by the Headteacher and SLT to ensure its effectiveness and alignment with school priorities, adapting as necessary to reflect changing support needs within the classroom and wider school community.



https://www.unison.org.uk/content/uploads/2016/06/TA-Standards.pdf

Overview of Teaching Assistant Standards 2016

The four themes

The professional standards for teaching assistants are set out in four themes.

- **personal and professional conduct**
- **knowledge and understanding**
- **teaching and learning**
- **working with others**

Within each theme there are several standards expected of teaching assistants.

Why were these themes chosen?

Personal and professional conduct

In order for teaching assistants to provide effective support to teachers and pupils, they need to be clear about their role and responsibilities and how these fit within the wider structure of the school. In the same way as teachers, teaching assistants operate in a position of trust and are seen by pupils as role models. They should be able to maintain proper boundaries with pupils and their behaviours should reflect this responsible position.

Knowledge and understanding

Teaching assistants should have sufficient knowledge and skills to help teachers support pupils in achieving their maximum potential. School leaders are best placed to make judgements about the type and level of knowledge and skills that individual teaching assistants need, as this will vary according to job role. This could include: subject knowledge, specialist skills and knowledge to support pupils with special educational needs or disabilities, knowledge of the curriculum, lesson planning and evaluation, and behaviour management strategies. 6

Teaching and learning

An important role of a teaching assistant is to support the teacher in ensuring the best possible outcomes for all pupils. Teaching assistants work under the supervision of a teacher in accordance with arrangements made by the headteacher of the school. Teaching assistants and schools should refer to the Education Endowment Foundation guidance report (see Further information) for 'relevant strategies to support the work of the teacher'.

Working with others

Teaching assistants work with other professionals, parents, carers and outside agencies as well as with pupils themselves.

Personal and professional conduct

Teaching assistants should uphold public trust in the education profession by:

1. Having proper and professional regard for the ethos, policies and practices of the school in which they work as professional members of staff.

2. Demonstrating positive attitudes, values and behaviours to develop and sustain effective relationships with the school community.

3. Having regard for the need to safeguard pupils' wellbeing by following relevant statutory guidance along with school policies and practice.

4. Upholding values consistent with those required from teachers by respecting individual differences and cultural diversity.

5. Committing to improve their own practice through self-evaluation and awareness.

Knowledge and understanding

Teaching assistants are expected to:

1. Acquire the appropriate skills, qualifications, and/or experience required for the teaching assistant role, with support from the school employer. 7

2. Demonstrate expertise and skills in understanding the needs of all pupils (including specialist expertise as appropriate) and know how to adapt and deliver support to meet individual needs.

3. Share responsibility for ensuring that their own knowledge and understanding is relevant and up to date by reflecting on their own practice, liaising with school leaders and accessing relevant professional development to improve personal effectiveness.

4. Demonstrate a level of subject and curriculum knowledge relevant to their role and apply this effectively in supporting teachers and pupils.

5. Understand their roles and responsibilities within the classroom and whole school context recognising that these may extend beyond a direct support role.

Teaching and learning

Teaching assistants are expected to:

1. Demonstrate an informed and efficient approach to teaching and learning by adopting relevant strategies to support the work of the teacher and increase achievement of all pupils including, where appropriate, those with special educational needs and disabilities.

2. Promote, support and facilitate inclusion by encouraging participation of all pupils in learning and extracurricular activities.

3. Use effective behaviour management strategies consistently in line with the school's policy and procedures.

4. Contribute to effective assessment and planning by supporting the monitoring, recording and reporting of pupil progress as appropriate to the level of the role.

5. Communicate effectively and sensitively with pupils to adapt to their needs and support their learning.

6. Maintain a stimulating and safe learning environment by organising and managing physical teaching space and resources. 8

Working with others

Teaching assistants are expected to:

1. Recognise and respect the role and contribution of other professionals, parents and carers by liaising effectively and working in partnership with them.

2. With the class teacher, keep other professionals accurately informed of progress or concerns they may have about the pupils they work with.

3. Understand their responsibility to share knowledge to inform planning and decision making.

4. Understand their role in order to be able to work collaboratively with classroom teachers and other colleagues, including specialist advisory teachers.

5. Communicate their knowledge and understanding of pupils to other school staff and education, health and social care professionals, so that informed decision making can take place on intervention and provision.

Performance Development Cycle for Administrative Staff at Brightwalton C of E Primary School

Given the small staffing structure at Brightwalton C of E Primary School, this cycle for administrative staff, including the School Business Manager, is designed to support the efficient and effective operation of the school. The cycle aligns with the school's values and mission, providing a structured but flexible approach that supports the unique roles within the admin team.

Performance Development Timetable for Administrative Staff

Meeting/Activity	Purpose	Timing
1. Initial Goal Setting and Planning Meeting	Establish role-specific goals aligned with school needs and the individual's responsibilities.	October
2. CPD and Role Development Planning	Identify training and development needs; ensure role-specific CPD opportunities.	October
3. Mid-Year Review	Review progress towards goals and adjust responsibilities or support if necessary.	Before Easter
4. Final Performance Review	Summative review of performance, feedback on achievements, and preliminary goal-setting for the following year.	July

Detailed Performance Development Cycle for Administrative Staff

This cycle focuses on the roles and responsibilities of the admin staff, ensuring they can effectively support school operations, pupil records, finance, and resource management. The cycle also includes specific guidance for the School Business Manager as the primary performance manager for the admin team.

1. Initial Goal Setting and Planning Meeting

- **Objective for Admin Staff:** Define clear goals for the year, focused on the operational support each role provides, from front-office duties to resource management, finance, and pupil records.
- **Guidance for the School Business Manager as Performance Manager:**
    - **Preparation:** Reflect on the school's operational priorities for the year, including any key projects, expected tasks, or procedural improvements that align with the school's goals.
    - **Goal Setting:** Set specific, achievable goals for each admin staff member. Examples might include:
        - Improving efficiency in front-office processes, such as communication with parents or handling of pupil records.
        - Streamlining assessment admin process and identify resource allocation required to support teacher/ Head teacher.
        - Enhancing the management of administrative tasks to support the teaching staff effectively.

- **SMART Goals:** Each goal should be Specific, Measurable, Achievable, Relevant, and Time-bound (SMART). Emphasise the impact of their roles on school efficiency and the support they provide to the educational team.
- **Documentation:** Record the goals in an individual development plan. Ensure that each admin staff member understands their role expectations and feels supported.

2.CPD and Role Development Planning

- **Objective for Admin Staff:** Identify relevant CPD opportunities to enhance skills essential to their administrative roles.
- **Guidance for the School Business Manager:**
  - **Identify Training Needs:** Review each admin staff member's goals and identify any specific training or professional development needed. Possible CPD areas might include:
    - management software training, attendance training, safeguarding training or updates for staff involved in school admin processes.
    - Courses on school MIS software or data protection for those managing pupil records.
    - Customer service or communication workshops, particularly for front-office staff.
    - Attendance training to support oversight reporting to the Head teacher or designated teacher.
  - **Role-Specific Development Plan:** Outline a tailored CPD plan for each staff member. Ensure training sessions are practical and relevant to their responsibilities.
  - **Scheduling and Follow-Up:** Set a schedule for CPD activities and follow up to ensure skills learned are implemented effectively in daily tasks.

3.Mid-Year Review

- **Objective for Admin Staff:** Review progress towards established goals, discuss any challenges, and adjust responsibilities or support as needed.
- **Guidance for the School Business Manager:**
  - **Preparation:** Observe and assess each admin staff member's progress on set goals. Note any positive impact they've had on school operations or where they might need additional support.
  - **Review Meeting Structure:** During the review, discuss:
    - **Achievements and Progress:** Acknowledge areas where they have made significant contributions or improved processes.
    - **Challenges and Support Needs:** Address any areas where they are facing challenges and consider additional support or training if needed.
    - **Adjustments to Responsibilities:** If necessary, adjust daily tasks or introduce new responsibilities to better align with the needs of the school and the staff member's skills.
  - **Documentation and Next Steps:** Document outcomes from the review, including any adjustments made, and set any new mini-goals if required. Schedule regular check-ins if necessary to support ongoing progress.

4.Final Performance Review

- **Objective for Admin Staff:** Conduct a summative evaluation, recognising achievements, providing constructive feedback, and establishing preliminary goals for the following year.
- **Guidance for the School Business Manager:**
    - **Preparation:** Review all progress made throughout the year, including CPD completed, goals achieved, and feedback from other staff (if relevant) on admin support provided.
    - **Performance Summary:** Acknowledge the admin staff member's contributions to the school's operation. Structure feedback to cover:
        - Their role in improving school efficiency, whether in communications, financial management, or general operations.
        - Any improvements in their handling of records, resources, or their responsiveness to school needs.
    - **Preliminary Goal Setting:** Discuss potential goals for the next academic year based on their progress, new school objectives, and any evolving responsibilities.
    - **Documentation:** Complete a final evaluation report, noting achievements, areas for growth, and any preliminary goals for the following year.

Performance Development Cycle for the School Business Manager

This Performance Development Cycle for the School Business Manager (SBM) is structured to support their unique and integral role in managing the school's operational, financial, and administrative functions. The cycle provides a framework for the Headteacher to guide and support the SBM's professional growth, ensuring alignment with the school's strategic goals and fostering a collaborative, efficient school environment.

Performance Development Timetable for School Business Manager

Meeting/Activity	Purpose	Timing
1. Strategic Goal Setting Meeting	Define strategic goals aligned with the school's vision and operational priorities.	Early October
2. CPD and Role Development Planning	Identify professional development needs and specific skills required for role fulfilment.	November
3. Mid-Year Review	Assess progress on goals, review impact, and address any new priorities or support needs.	Late March
4. Final Performance Review	Summative evaluation, goal completion, feedback on achievements, and preliminary goal-setting for the next year.	Early July

Detailed Performance Development Cycle for the School Business Manager

This cycle is designed to foster the School Business Manager's strategic, financial, and operational effectiveness, while supporting their professional development to meet the school's evolving needs. The Headteacher's role as performance manager is to provide strategic oversight, guidance, and structured support.

1. Strategic Goal Setting Meeting

- **Objective for the SBM:** Set high-level goals for the year that reflect the school's strategic, financial, and operational needs. Goals should support the SBM's role in enhancing the school's efficiency, resource management, and compliance with policies and regulations.
- **Guidance for the Headteacher as Performance Manager:**
    - **Preparation:** Review the school's strategic objectives, budget priorities, and operational plans. Identify areas where the SBM's role is critical to achieving these objectives, such as financial oversight, risk management, or facilities improvement.
    - **Goal Setting:** Set two to three key goals for the SBM that are specific, achievable, and have a direct impact on the school's performance. Examples might include:
        - Implementing cost-saving initiatives or efficiency measures to optimise the school's budget.
        - Enhancing facilities management and maintenance practices to support a safe, effective learning environment.

        - Strengthening compliance with financial and operational regulations to support school accountability.
    - **SMART Goals:** Ensure each goal is Specific, Measurable, Achievable, Relevant, and Time-bound. Emphasise strategic impact and school-wide benefit.
    - **Documentation:** Record the goals in a professional development plan and ensure the SBM understands their responsibilities, timeline, and any specific expectations.

2. CPD and Role Development Planning

- **Objective for the SBM:** Access professional development resources that build skills necessary for role-specific duties and strategic goals.
- **Guidance for the Headteacher:**
    - **Identify Training Needs:** Based on the SBM's goals and school priorities, identify relevant CPD opportunities. Potential training areas might include:
        - Advanced financial management or budget optimisation techniques for improved financial planning.
        - Training on compliance and regulatory updates relevant to school operations.
        - Leadership development to enhance team management and cross-functional collaboration within the school.
    - **Create a CPD Plan:** Work with the SBM to structure a CPD plan that includes a mix of training sessions, workshops, or conferences that are strategically beneficial to the school.
    - **Scheduling and Accountability:** Confirm the CPD timeline and ensure the SBM has opportunities to apply new skills in their role. Set expectations for them to share key takeaways with the Headteacher and other relevant staff.

3. Mid-Year Review

- **Objective for the SBM:** Conduct a formal review of progress towards goals, evaluating the impact of their efforts on the school's operations, finance, and compliance.
- **Guidance for the Headteacher:**
    - **Preparation:** Assess the SBM's achievements to date, including any efficiencies implemented, financial outcomes, and improvements in school operations. Gather feedback from relevant stakeholders if needed.
    - **Review Meeting Structure:** Use this meeting to:
        - **Acknowledge Successes:** Recognise key achievements and any positive changes the SBM has facilitated in school operations or finances.
        - **Identify Challenges:** Discuss any barriers or challenges the SBM may be facing in reaching their goals, and provide additional support or resources if needed.
        - **Adjust Goals if Necessary:** Consider any shifts in the school's strategic needs and adjust goals or responsibilities to address emerging priorities.
    - **Documentation and Next Steps:** Document the review outcomes, including any agreed-upon adjustments, and outline any additional support for the SBM to stay on track.

4. Final Performance Review

- **Objective for the SBM:** Summative review of the SBM's achievements, impact on school operations, and professional growth, along with setting preliminary goals for the next year.
- **Guidance for the Headteacher:**
    - **Preparation:** Review the SBM's progress over the full year, assessing goal completion, financial performance, and operational improvements. Consider any feedback from other staff members who have collaborated with the SBM.
    - **Summative Review:** Acknowledge the SBM's contributions to the school's success. Structure feedback around:
        - The SBM's effectiveness in financial management, budget adherence, and identifying efficiency opportunities.
        - Their role in improving operational practices and compliance with school policies.
        - Any developments in leadership or management skills that have positively impacted the school.
    - **Preliminary Goal Setting for Next Year:** Based on this year's progress and the school's upcoming needs, outline preliminary goals that will help the SBM continue to contribute strategically.
    - **Documentation:** Complete a final evaluation report, recording achievements, areas for growth, and initial goal ideas for the following academic year. Encourage the SBM to reflect on their development and prepare for the next cycle.