

ReFocus School Performance Management Procedure

1. Introduction

Performance Management is a vital element of continuous school improvement and professional accountability. At ReFocus, the Performance Management process ensures that all staff are supported and challenged to meet high professional standards. It plays a crucial role in driving school improvement, supporting staff development, and holding staff accountable for their contributions to student outcomes and school success.

2. Purpose of Performance Management

- To promote high standards of teaching, learning, student care and wellbeing and operational effectiveness
- To set clear expectations aligned with school priorities
- To support professional development and career progression
- To provide a fair and transparent system for awarding performance-related bonuses

The culture of the Performance Management process at ReFocus is designed to secure a collaborative approach where staff are actively involved in high quality target setting and developmental appraisal.

3. Setting Effective Targets

It is usual for 3 appraisal targets to be set. Targets must follow the SMART framework:

- Specific – Clear and well-defined
- Measurable – Evidence-based success criteria
- Achievable – Realistic and manageable
- Relevant – Linked to role, experience, SIP
- Time-bound – Includes clear deadlines and milestones

4. Timeline and Cycle of Review

ReFocus operates a structured three-point Performance Management cycle using a combination of Bromcom and bespoke PM paperwork (included in this procedures appendices) to store and track targets:

September – Target/objective setting take place for all staff, both teaching and non-teaching. Targets must be recorded in Bromcom alongside relevant success criteria. All targets will be generated and/or reviewed and agreed by the Headteacher and Deputy Headteachers to ensure they align with the school improvement planning

1. **November/December** – A formal mid-point review must be undertaken by all staff/line managers to review progress against the agreed appraisal targets to raise and discuss concerns and action additional intervention or training required. (A guidance and **the template** for these mid-year review meetings can be found in Appendix A and B) (Evidence will be reviewed against targets to inform the awarding of term 1 bonus payments)

2. **March/April** – A formal mid-point review must be undertaken by all staff/line managers to review progress against the agreed appraisal targets to raise and discuss concerns and action additional intervention or training required. (A guidance and the template for these mid-year review meetings can be found in Appendix A and B) (Evidence will be reviewed against targets to inform the awarding of term 2 bonus payments)
3. **June/July** – A final, end of cycle professional review meeting is completed by staff and their line manager before staff submit their completed appraisal for formal assessment (A guidance and the **template** for these mid-year review meetings can be found in Appendix C and D)

NB The deadline for the submission by staff of completed paperwork for both the Mid-Year and End-of-Cycle review will be agreed and published annually.

This ongoing cycle ensures regular monitoring, timely support, and structured feedback.

5. Roles and Responsibilities

SLT Performance Management: Conducted by the Headteacher, supported by a governor committee.

All Other Staff: Performance Management is typically completed by line managers who best understand individual roles and responsibilities. Workload balance must be considered to avoid overburdening line managers and the Headteacher has discretion over appraiser allocation. Final bonus decisions are made by the Headteacher and the governor committee

6. Example Targets and Success Criteria

Targets are recorded in Bromcom and must follow the SMART framework:

- Specific – Clear and well-defined
- Measurable – Evidence-based success criteria
- Achievable – Realistic and manageable
- Relevant – Linked to role, experience, SIP
- Time-bound – Includes clear deadlines and milestones

For example:

- **By July 2026 - Incrementally improve the 5 identified Year 10 student with attendance below 85% by 5% in Year 11 using personalized targeted interventions.**
- Lead the implementation of a new reading strategies (across the academic year 2025-26) to raise functional literacy by 10% for the 10 Year 9 male students.
- Design and trial a new pastoral 1-1 check-in system for a small group of identified students who are displaying risky online behaviours. Run the system for 8 months and produce a report on its impact and potential next steps
- **Attend a county-wide safeguarding training, produce a training update and then present this to all staff across the 3 sites by December 2026.**

Each target must include success indicators and measures

For example:

Attend a county-wide safeguarding training, produce a training update and then present this to all staff across the 3 sites by December 2026.

Success Criteria

- Staff member attends the county-wide training
- A signed register is completed to ensure attendance by all ReFocus staff
- A short low stakes quiz/reflection document/training needs audit etc is completed by all ReFocus staff following their in-house training
- A next steps action plan is written in conjunction with the DSL

By July 2026 - Incrementally improve the 5 identified Year 10 student with attendance below 85% by 5% in Year 11 using personalized targeted interventions.

Success Criteria

- 5 Year 10 students with attendance issues are identified and have a 1-1 meeting with the staff member and their parents/carers outlining the concerns and actions to follow
- Set effective individual targets are set for each student eg 2-3 attendance interventions are identified including: use of pastoral staff to collect the student on a Monday morning; agree loss of breaktime for 3 missed sessions; an agreed reward for 6 consecutive session attendance etc
- In March 1-1 interviews with students are used to review the ongoing impact of the interventions and any adaptations/changes are recorded
- Attendance for each individual improves by 5% on their Year 10 attendance

7. The mid-year review

Performance management is a continuous process of identifying, measuring, and developing the performance of Staff at ReFocus. A crucial component of this process is the mid-year reviews, structured evaluation occurring at midway points through the performance cycle. Preparation is key to a successful mid-year review. Both line managers and staff should review performance targets, evidence of progress and any relevant documentation. This meeting should take between 40 minutes to an hour. Reflecting on the previous term helps in identifying key discussion points and further actions.

Setting the Agenda

A structured agenda ensures that the review covers all important aspects. Common agenda items include:

- Review of goals and objectives
- Assessment of achievements and areas for improvement
- Discussion of challenges and obstacles
- Feedback from the manager
- Feedback from the employee

- Target review and action for the remainder of the year

Please refer to the mid-year review document to support this process, Appendix A and B.

8. Monitoring and Reviewing Progress

A wide range of review tools and review opportunities are available to support the Performance Management process including:

- planning reviews
- Lesson and meeting observations
- marking samples
- student and parent voice
- 360 feedback, and/or self-assessment,
- Bromcom analytics

Mid and Final Reviews will consider both qualitative and quantitative evidence gathered.

The monitoring and review process within this formal Performance Management procedure is designed to provide support and reasonable adjustments, and could include additional time for completion, provision of mentoring or identified training, access to additional resources etc.

All stages of the Performance Management process at ReFocus are designed to ensure there is the opportunity for effective ongoing dialogue and constructive feedback between staff and their line managers across the academic year

9. Addressing Concerns

If concerns about performance arise at any point within the cycle the following can be applied:

- Initiate informal support: feedback, objectives, timeline
- Offer support strategies (e.g., coaching, mentoring)
- Monitor improvement with review deadlines
- If progress is insufficient, move to formal capability (Please see ReFocus capability procedure)

10. Linking Personal Development Planning (PDP) and Continued Professional Development (CPD) to Performance Management

Performance Management objectives should be tied to:

- Staff career goals
- Whole school priorities, helping managers to make effective arrangements to identify and meet learning need
- Emerging practice or methodologies, developing the new skills, knowledge, values and behaviour that staff need to do their current jobs well

Linking staff training and development to targets boosts morale, retention, and performance. PDP and CPD training needs should be included in the discussion and documentation at each of the points of the Performance

Management cycle. External training should be requested through the PDP documentation and submitted to the Headteacher or SLT for approval. Staff should generally expect to receive agreed support noted in their Performance Management statements.

11. PDP and CPD Request Procedure

Staff may also apply for PDP/CPD separately to their Performance Management targets. Again, the agreed documentation form must be submitted for line manager and Headteacher approval in this case.

12. The End of Cycle Appraisal Meeting

The appraisal meeting is the end point of the annual appraisal process and will take place in June/July (unless student outcomes are required as evidence). Appraisal meetings will take place within normal working hours and will typically last for 40 minutes to 1 hour. In this meeting, the appraiser will:

- Review the evidence against relevant standards, objectives and success criteria
- Have a reflective discussion about the employees PDP/CPD journey, progress, needs and career development/aspirations, and identify action that should be taken
- Discuss the teacher's workload, wellbeing, working hours and flexible working opportunities in a supportive manner
- If concerns about performance arise. The following can be applied:
 - Initiate informal support: feedback, objectives, timeline
 - Offer support strategies (e.g., coaching, mentoring)
 - Monitor improvement with review deadlines
 - If progress is insufficient, move to formal capability (Please see ReFocus capability procedure)

Following this end of cycle appraisal meeting the reviewer will complete a review statement and the employee will submit their completed appraisal for formal assessment through Bromcom

13. Conclusion

Performance Management at ReFocus is a collaborative, cyclical process centred on improvement, accountability, and development. Through structured review, evidence-informed decisions, and support for training and development, staff are empowered to grow professionally and deliver impactful outcomes for students.

APPENDIX A

Performance Management: Mid-Year Review Guidance

Introduction

Performance management is a continuous process of identifying, measuring, and developing the performance of Staff at ReFocus. A crucial component of this process is the mid-year review, a structured evaluation occurring midway through the performance cycle. This review provides an opportunity for both Staff and managers to reflect on achievements, address challenges, and set the course for the remainder of the year.

The Importance of Mid-Year Reviews

Providing Constructive Feedback

Mid-year reviews serve as a platform for providing constructive feedback. This feedback helps Staff understand their strengths and identify areas for improvement. Constructive feedback is essential for personal and professional growth, fostering a culture of continuous improvement.

Recognising Achievements

Acknowledging accomplishments boosts employee morale and motivation. The mid-year review offers a formal occasion to recognise Staff' hard work and dedication, reinforcing positive behaviours and encouraging continued excellence. This will play a key role in ensuring evidence is available to support the allocation of Refocus bonus payments.

Aligning to the School Improvement plan

Mid-year reviews are an opportunity to reassess and realign goals. As Refocus priorities may shift, it is important to ensure that individual objectives remain aligned with our Improvement planning. This alignment ensures that Staff' efforts contribute to Refocus's overall success.

Addressing Challenges

Challenges and obstacles are natural in any work environment. The mid-year review provides a forum for discussing these issues openly. By addressing challenges early, managers and Staff can collaborate on solutions, preventing small problems from escalating.

Conducting an Effective Mid-Year Review

Preparation

Preparation is key to a successful mid-year review. Both managers and Staff should review performance targets, evidence of progress and any relevant documentation. Reflecting on the first half of the year helps in identifying key discussion points.

Setting the Agenda

A structured agenda ensures that the review covers all important aspects. Common agenda items include:

- Review of goals and objectives
- Assessment of achievements and areas for improvement
- Discussion of challenges and obstacles
- Feedback from the manager
- Feedback from the employee
- Target review and action for the remainder of the year

Encouraging Open Communication

Open and honest communication is essential for productive review. Managers should create a safe environment where Staff feel comfortable sharing their thoughts and feedback. Active listening and empathy are crucial in fostering a positive dialogue.

Focusing on Development

Development should be a central theme for the mid-year review. Discussing training opportunities, career aspirations, and skill development plans helps Staff see a clear path for growth. Encouraging continuous learning benefits both the individual and the organization.

Documenting the Review

Documenting the review ensures that key points and agreements are recorded the template for these meetings can be found in appendix B and they should in part be completed by the employee ahead of the meeting. (The date of this meeting should be recorded in Bromcom) The meeting provides evidence of progress and informs the awarding of any term 1 bonus payments and serves as a reference for future evaluations and helps track progress. It also provides clarity on expectations and commitments.

Best Practices for Managers

Be Specific and Objective

Specific and objective feedback is more actionable than vague comments. Managers should use concrete examples to illustrate points, ensuring that feedback is clear and understandable.

Balance Positive and Negative Feedback

While it is important to address areas for improvement, a balanced approach that includes positive feedback is more effective. Recognizing achievements alongside constructive criticism maintains employee morale.

Follow-Up Regularly

The mid-year review should not be the only time feedback is provided. Regular check-ins and follow-up meetings help maintain momentum and address issues promptly.

Encourage Employee Participation

Staff should be active participants in the review process. Encouraging self-assessment and inviting feedback fosters a sense of ownership and accountability.

APPENDIX B

Mid-year review – all staff are expected to submit a completed copy of this template by the published deadline

MID-YEAR REVIEW DATE:		MID-YEAR CYCLE: 1 2
REVIEW OF PROGRESS OBJECTIVES		
Objective 1		
Success criteria	Actions taken	Evidence
Objective 2		
Success criteria	Actions taken	Evidence
Objective 3		
Success criteria	Actions taken	Evidence
POINTS FOR REFLECTION		COMMENTS

<ol style="list-style-type: none"> 1) What is going well? 2) What are my strengths and what skills have I developed? 3) What barriers/difficulties have I encountered? 4) What additional training and support do I need? 	
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REVIEWER STATEMENT
EMPLOYEE STATEMENT

Signed (Reviewee) Signed (Reviewer)

Date:

APPENDIX C

Performance Management: End of Cycle Review Guidance.

The Importance of End of Cycle Reviews

Recognising Achievements

The end of cycle review provides a formal opportunity to acknowledge staff contributions, celebrate successes, and highlight the impact of work on pupils, colleagues, and whole-school priorities. Recognition of achievement reinforces positive behaviours and motivates continued excellence.

Providing Constructive Feedback

This review serves as a structured platform to deliver constructive feedback. Clear, evidence-based feedback enables staff to understand their strengths and pinpoint areas for development. Constructive feedback should remain developmental in tone, promoting a culture of improvement and high professional standards.

Aligning with the School Improvement Plan

As the appraisal cycle concludes, it is important to ensure that staff contributions are explicitly linked to the school's strategic priorities and outcomes. This alignment helps demonstrate how individual performance supports the wider success of the organisation.

Supporting Professional Growth

The end of cycle review should identify future professional development opportunities and link them to staff aspirations and school needs. By doing so, the review not only closes the current cycle but also lays the foundation for the next cycle of growth and improvement.

Conducting an Effective End of Cycle Review

Preparation

Both staff and line managers should come prepared with evidence of performance across the appraisal cycle, including agreed objectives, progress updates, CPD undertaken, and reflections on challenges. Managers should review notes from the mid-year review to ensure continuity.

Setting the Agenda

A clear agenda ensures the end of cycle review is structured and comprehensive. Common agenda items include:

- Review of agreed objectives and success criteria
- Assessment of evidence against professional standards
- Recognition of achievements and contributions
- Discussion of challenges, barriers, and solutions
- Consideration of wellbeing and workload

- Professional development and career aspirations
- Summary of overall performance and agreement on outcomes

Encouraging Open Communication

End of cycle reviews should be collaborative. Managers must create a safe and respectful environment, allowing staff to share honest reflections on their performance and aspirations. Active listening and empathetic dialogue are key to ensuring the process is supportive and developmental.

Focusing on Development

The review should always look forward as well as back. Development discussions should focus on next steps for training, CPD, and career progression, setting the stage for target-setting in the new cycle.

Documenting the Review

The end of cycle review must be documented formally using the template in Appendix D with the meeting date recorded in Bromcom. The completed review paperwork must include a statement that records:

- Achievement of objectives
- Key discussion points
- Agreed outcomes and next steps
- Professional development requirements

This documentation ensures clarity, accountability, and provides a reference for future cycles.

Best Practices for Managers

- **Be Specific and Objective:** Use concrete examples and evidence to provide clear, actionable feedback.
- **Balance Recognition with Challenge:** Celebrate achievements while also identifying realistic areas for growth.
- **Consider Wellbeing:** Discuss workload, wellbeing, and flexible working in a supportive manner.
- **Encourage Reflection:** Invite staff to self-assess, share reflections, and contribute to the shaping of their future objectives.
- **Follow Through:** Ensure that CPD or development commitments made in the review are actioned and supported.

Conclusion

The **end of cycle review which takes place in June/July (unless evidence from external outcomes is required)** closes this phase of the performance management process, **before new targets are set in September**. Through recognition, reflection, and forward planning, this review reinforces accountability, celebrates contribution, and supports staff to continue growing and achieving at the highest professional standard.

APPENDIX D

End of cycle template

END OF CYCLE MEETING DATE:		
REVIEW OF PROGRESS OBJECTIVES		
Objective 1		
Success criteria	Actions taken	Evidence
Objective 2		
Success criteria	Actions taken	Evidence
Objective 3		
Success criteria	Actions taken	Evidence

POINTS FOR REFLECTION	COMMENTS
<ol style="list-style-type: none"> 1) What has gone well this year? 2) What key achievements am I most proud of? 3) What challenges or barriers did I encounter, and how were they addressed? 4) How have I contributed to whole-school priorities / the School Improvement Plan? 	

<p>5) What skills and strengths have I developed?</p> <p>6) What further professional development or support would benefit me?</p>	
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PROFESSIONAL DEVELOPMENT & FUTURE ASPIRATIONS	
Training/CPD undertaken this year:	
Training/CPD requested for the next cycle:	
Career aspirations and next steps:	

<p>REVIEWER STATEMENT – (Manager to summarise key outcomes, feedback, and overall performance assessment)</p>
<p>EMPLOYEE STATEMENT – (Staff member to summarise key outcomes, feedback, and overall performance assessment)</p>

Signed (Reviewee) Signed (Reviewer)

Date: