

<b>Title</b>	<b>Performance Management: annex to pay progress policy</b>
<b>Issue date:</b>	7 May 2021
<b>Issued by:</b>	Raleigh Learning Trust
<b>Period covered:</b>	Applies to the 2020-21 academic year



## Introduction

In January schools across the Trust began the journey back to normality, and there now needs to be a period of transition as many of the disrupted processes and practices of everyday activity are revisited and, in some cases redefined.

Performance management for staff has also continued in some form even if elements of the carefully thought through professional development plans and objectives set at the start of the year may have had to be set aside. This September saw many of you adopting different strategies to deal with the particular circumstances in your school. However, there are some elements that remain a requirement and this annex to the pay progression policy attempts to set out what should be achieved in this current appraisal cycle.

## What remains non-negotiable?

Appraisals and other performance management processes for teachers must continue during this academic year, as guidance from the Department of Education sets out. The Trust adheres to the School Teachers Pay and Conditions Document (STPCD). The document currently includes the requirement to ensure that all pay progression for teachers is linked to performance management.

## What has changed?

Although the DfE has stipulated that schools should continue to follow the STPCD and ensure that pay progression remains linked to performance management, it advised schools to revise their arrangements in view of the circumstances. This advice remains in place for this current 2020-21 academic year:

“We would expect schools to use their discretion and take pragmatic steps, consistent with the Education (School Teachers’ Appraisal) (England) Regulations 2012 to adapt performance management and appraisal arrangements to take account of the current circumstances, for example, by basing performance on the period schools were open, adjusting, if necessary, for expected trajectory had there been no closures.”

The DfE has also made clear that support staff appraisals and performance management should continue, in line with an employee’s contract of employment (the DfE does not specify pay or terms and conditions of employment for support staff).

The guidance for schools was then updated in early June 2020. This update reinforced to the Trust the requirement to adhere to the STPCD but have further licence to “use their discretion and take pragmatic steps, to adapt performance management and appraisal arrangements to take account of the current circumstances.”

The key point was also made in the guidance that schools across the Trust must avoid any unintended detriment to staff pay progression if they cannot achieve objectives as expected due to the circumstances. Again, this advice remains relevant for this 2020-21 academic year:

“Schools must ensure that teachers are not penalised during the appraisal process or in respect of any subsequent pay progression decisions as a result of partial school closures, where this has impacted on the ability of the teacher to meet fully their objectives.”

### **Key principles for revised arrangements**

**Our approach is inclusive for all staff:** Teachers and support staff who are subject to performance management/appraisal will suffer no detriment as a result of school restrictions and staffing arrangements due to COVID-19.

**Individual circumstances will be considered:** Remembering that a significant part of the 2020-21 academic year was spent in lockdown will mean that the circumstances of each individual will be part of a conversation about progress and objectives. Those issues may include:

- Living alone, struggling with a lack of contact
- Unable to exercise and feeling a real impact on their wellbeing
- Shielding
- Caring for others
- Bereavement
- A demanding and irregular work rota
- Juggling home responsibilities and shifting workloads

**Reasonable adaptation will be made:** We recognise that some objectives set for the 2020-21 period, which may or may not have been subject to a mid-year review, may not be achievable in this cycle.

**An evidence-based review will apply:** Evidence still remains vital and any judgement regarding the progress towards objectives will be based on agreed, documented evidence available for the appraisal cycle period, however, it must reflect the COVID-19 pandemic circumstances and the recognition of the impact of the Winter lockdown, and be flexible to acknowledge the vital work undertaken during remote and partial opening arrangements (these were different across the Trust reflecting the diversity of school types).

**Engagement:** Colleagues are required to engage in their review positively. Purposeful participation will support reviewers to gather the evidence to help an individual pay progression recommendation.

*It cannot simply be the case that someone move automatically by asking to apply one or more of the 'individual circumstances' criteria. This approach would not offer the individual the opportunity to celebrate work undertaken in line with their objectives or provide the reviewer with an evidence base for Trust moderation, therefore hindering a reviewer's ability to support a pay recommendation. Moderation supports adherence to the STPCD and the Trust Pay committee in their considerations.*