

PERFORMANCE DEVELOPMENT FRAMEWORK

SEPTEMBER 2025

1. Introduction: A New Approach to Performance Development

At Reach South Academy Trust, we are committed to fostering a culture of continuous growth, collaboration, and professional development for every member of staff. This Performance Development Framework represents a significant evolution from traditional appraisal systems.

What's Changing – In Summary

- We are moving away from performance related pay.
- We are replacing annual appraisals with ongoing developmental dialogue.
- We are prioritising growth, values, and strategic alignment over compliance.

This framework places meaningful, reflective conversations at the heart of development, empowering every individual to thrive and contribute to the success of their school and the wider Trust.

Rather than treating performance as a moment in time, this framework repositions it as a continuous and evolving journey. Our aim is to help every colleague feel valued, supported, and invested in, with attention to individual needs and inclusive practices that ensure no one is left behind.

2. Our Developmental Philosophy

This model is rooted in the understanding that professional growth is a shared responsibility. Every employee is encouraged to reflect regularly on their own practice, seek feedback, and engage in honest, constructive dialogue with their line manager. Equally, managers play a crucial role in creating the conditions where staff feel safe to reflect, challenge themselves, and stretch their abilities.

This framework represents a significant evolution from traditional appraisal systems. To ensure its success and consistent application across the Trust, all line managers are expected to actively engage with and use this framework as the primary guide for supporting the continuous professional development of their staff. This includes fostering open dialogue, providing regular feedback, and collaboratively setting and reviewing developmental objectives as outlined within this document. Managers play a crucial role in creating the conditions where staff feel safe to reflect, challenge themselves, and stretch their abilities. To support this, all line managers are expected to undertake training to ensure they adopt the best possible approach in applying the framework effectively and confidently.

Performance development is:

- **Ongoing:** Conversations occur regularly throughout the year, not just during a single review point.
- **Developmental:** The primary focus is growth, not accountability for pay decisions.
- **Reflective:** Staff are encouraged to learn from successes and setbacks alike.

- **Aligned:** Individual objectives are shaped in the context of school improvement priorities and Trust-wide strategy.
- **Inclusive:** The process is fair, transparent, and accessible to all, with a strong commitment to equity and equality.

This approach nurtures intrinsic motivation and professional pride. It helps staff see the value in their work and their potential to improve, innovate, and lead.

3. What You Can Expect from the Trust

We are committed to ensuring all staff have the resources, support, and opportunities they need to thrive, recognising that equity may look different for different people. As a member of staff, you can expect:

- A consistent and inclusive framework that supports equitable treatment across all roles and settings.
- Access to high-quality professional development aligned to both individual needs and Trust-wide priorities.
- A clear separation between performance development and pay decisions, enabling open and growth-focused conversations.
- The Trust is committed to the regular evaluation of the framework to ensure it remains fair, impactful, and supportive of all staff. To achieve this, the Trust will conduct annual staff surveys or feedback cycles, monitor engagement and outcomes across teams and roles, and use findings to adapt and refine the process in partnership with staff and union representatives. This ongoing evaluation demonstrates a clear intent and plan for continuously improving the framework. A strong and visible commitment to diversity, inclusion, and accessibility, ensuring that no individual or group is disadvantaged by the process.

These commitments reflect the Trust's belief that every colleague deserves to feel valued, supported, and empowered to grow throughout their career. As a Trust we have an ambition to grow people to make our Trust sustainable and use succession planning as a tool for school improvement.

4. Guiding Principles

Our framework is built on a foundation of clear principles that reflect our values and ensure the approach remains purposeful, inclusive, and sustainable. These guiding principles shape how performance development is experienced and practiced across the Trust:

- **Trust-based and collaborative:** Conversations between staff and managers should be based on mutual trust, respect, and shared responsibility.
- **Development, not evaluation:** From September 2025, pay progression is no longer linked to performance reviews. This shift allows for a more open and forward-looking approach.

- **Staff-led growth:** Employees are encouraged to take ownership of their own development by setting goals that matter to them and align with their aspirations.
- **Flexible and responsive:** The framework allows for change, objectives and priorities can evolve during the year in response to shifting circumstances.
- **Clear expectations:** All staff should be supported to meet relevant professional standards and role expectations while also having space to explore career growth and personal development.

5. Roles and Responsibilities

For the framework to be effective and consistently applied, everyone in the organisation has a part to play. The following roles outline the shared responsibilities that underpin a culture of trust, reflection, and professional growth:

Role	Key Responsibilities
Employees	Reflect on progress, prepare for meetings, identify support needs and wellbeing considerations, and proactively consider and propose developmental objectives for the upcoming cycle
Line Managers	Facilitate fair, supportive conversations; offer feedback and guidance with awareness of individual needs while attending relevant training and staying up to date with best practices.
People Team	Provide tools, training, oversight, and ensure consistency with inclusive practice
Leaders	Model engagement, foster a culture of professional growth and inclusive development

This shared commitment supports a consistent, positive experience across the Trust, ensuring that all individuals, including those with protected characteristics or in non-standard roles, can thrive. Leaders are expected to proactively implement anticipatory adjustments, such as flexible working or mentoring options, wherever possible, embedding this approach from the outset through inclusive onboarding, induction, and integration practices

6. Annual Development Cycle

Performance development is most effective when it is part of a consistent and predictable rhythm. This annual cycle provides a structure that supports ongoing dialogue, responsiveness to change, and alignment with both individual and organisational priorities:

Cycle Dates: 1 September – 31 August

- **Initial Review & Objective Setting (by 31 October):**
Staff and managers meet to reflect on learning from the previous year and agree new SMART objectives.

- **Ongoing Development Reviews:**

A minimum of termly conversations must be held to monitor progress, provide support, and adjust objectives. Staff and managers are encouraged to meet more frequently where appropriate, especially during times of transition or increased challenge.

- **Contextual Flexibility:**

For staff joining or changing roles mid cycle, managers will agree appropriate objectives to restore consistency and maintain inclusivity.

These checkpoints are not formal appraisals. They are structured opportunities for reflective, forward-looking dialogue that emphasise development over judgement, and include space to reflect on individual wellbeing, personal context, and any adjustments needed to support professional growth.

7. How to Develop Meaningful and SMART Objectives

Effective performance development relies on setting clear and purposeful objectives.

When developing objectives, consider how an individual's cultural background, personal history, or lived experience might influence their approach to work and development. For example, a colleague who is the first in their family to enter the profession may benefit from longer-term career mapping conversations or additional coaching to build confidence and networks. Similarly, a staff member returning from extended leave might benefit from phased objectives or mentoring support.

Leaders are encouraged to take a proactive and personalised approach, embedding inclusive practices throughout performance development, and aligning them with onboarding, induction, and integration processes wherever possible. This ensures that all colleagues have a fair opportunity to thrive and contribute meaningfully, regardless of background or circumstance.

The SMART framework supports staff and managers to co-create goals that are practical, motivating, and aligned with strategic and personal priorities. **Appendix A: Smart Objectives Guides** provides further information to support the process.

SMART Objectives should be:

- **Specific: Clear and precise about what is to be achieved**
- **Measurable:** Includes criteria to track progress and confirm completion
- **Achievable:** Realistic based on available resources, time, and role
- **Relevant:** Aligned with team, school, or Trust priorities
- **Time-bound:** Has a defined timeframe or deadline

Three Focus Areas:

- **Organisational:** Linked to School Improvement Plans (SIP), and wider Trust priorities
- **Professional Standards:** Anchored in national role specific expectations.

- **Personal Development:** Focused on growth, skill building, or career aspirations.

Staff are encouraged to develop objectives across all three domains. (See **Appendix B:** SMART Objectives Template with Examples).

8. Preparing for Performance Development Meetings

Thoughtful preparation is essential to ensure that performance development meetings are meaningful, focused, and productive. Both employees and managers share responsibility for coming to these conversations well-prepared and ready to engage in reflective dialogue.

Each performance development meeting is an important part of the annual cycle and must be carefully prepared for by both the employee and their line manager.

Preparation enables quality conversations. Both staff and managers should:

- Ensure alignment with Trust strategic objectives, relevant business plans, and improvement priorities at local and organisational levels.
- Reflect on achievements, lessons learned, and feedback received.
- Consider how their work aligns with Trust values and inclusive behaviours.
- Gather relevant documents (e.g., self-evaluations, CPD records, stakeholder feedback)

Managers should also consider contextual factors such as recent role changes, absence, or transitions within the Trust. (See **Appendix C:** Preparation Checklist for Review Meetings)

9. The Performance Development Meeting

The annual performance development meeting is a key milestone in the cycle. It provides a structured opportunity for staff and managers to reflect on progress, celebrate successes, identify development needs, and plan forward with clarity and shared purpose. Before the meeting, managers should reflect on how they create psychologically safe spaces, ensuring colleagues feel respected, heard, and supported to engage openly and constructively.

Timing: Held annually by 31 October

A. For Continuing Staff

- Review of progress against previous SMART objectives
- Reflection on strengths, outcomes, values, and standards
- Identification of challenges and how they were addressed.
- Agreement of new SMART objectives aligned with priorities and development needs.

B. For New Staff

- Clarification of role, key responsibilities, and strategic alignment
- Review of feedback from induction
- Identification of initial strengths and support needs

- Agreement of SMART objectives tailored to entry point.

C. For All Staff

- Clear documentation using the Trust's standard template.
- Confirmation of dates for termly check-ins
- Identification of immediate development or support needs (e.g. coaching, CPD)
- A positive and constructive summary that reinforces the developmental purpose of the framework and recognises individual contribution. (See **Appendix D: Review Meeting Agenda and Prompts**)

10. Supporting Documentation and Ongoing Development

Clear and timely documentation plays a crucial role in reinforcing developmental conversations and maintaining momentum throughout the year. This section outlines what is required to support transparency, continuity, and accountability while keeping the process manageable:

All performance development meetings must be formally recorded. The completed documentation must:

- Capture agreed objectives, discussion points, and next steps in a clear, concise manner.
- Be shared with the employee within a reasonable timeframe to support transparency, enable progress, and ensure implementation of improvements is not adversely affected.
- Be retained by the line manager and submitted in line with Trust procedures for annual reporting and monitoring.

Documentation is intended to support development and accountability without becoming administratively burdensome. The focus remains on the quality of dialogue and clarity of actions, not paperwork volume.

To support meaningful and informed development conversations, staff and line managers should organise and bring relevant documentation — such as self-evaluations, CPD records, professional standards (e.g. Headteachers, Teachers, CIPD, CIPFA), or notes from previous reviews.

Following the initial meeting, line managers must maintain regular, at least termly, check-ins with staff to review progress, offer timely feedback, and provide support where needed. These informal updates help sustain momentum and ensure that performance development is an active, ongoing process, not a one-off event.

Managers are also expected to seek feedback from staff on the usefulness and impact of these conversations. This helps improve practice and reinforces a culture of continuous improvement and professional trust. Feedback should be recorded alongside any agreed

actions to ensure transparency and accountability and must not be lost or disregarded—even when the feedback shared is challenging.

To evaluate the framework's effectiveness, the Trust will:

- Conduct annual staff surveys or feedback cycles.
- Monitor engagement and outcomes across teams and roles.
- Review key organisational metrics such as retention rates, absence data, and internal progression to understand impact.
- Use findings to adapt and refine the process in partnership with staff and union representatives.

Staff development is not simply a task to complete but a dynamic relationship that grows through meaningful interaction, reflection, and shared purpose.

11. Embedding a Growth Culture

For this framework to be truly effective, it must be lived in everyday practice. We encourage all leaders and teams to make performance development part of the rhythm of Trust life, embedded in daily working practices across all roles and settings, not treated as an isolated process. This includes:

- Regular team discussions on professional learning
- Recognition of development successes
- Responsive adaptation of objectives where needed.

Visible modelling of a growth mindset by leader, demonstrating a belief that abilities and performance can improve through effort, learning, and persistence.

Performance development is most powerful when it becomes part of how we work, not something additional to it. When it is embedded in our routines and values, it supports not only individual growth but a stronger, more connected professional community across the Trust.

We want staff to feel proud of their progress, confident in their potential, and supported at every step.

Conclusion

The Performance Development Framework is more than a process; it is a commitment. A commitment to value every member of staff, to invest in their potential, and to build a Trust where growth, learning, and contribution are part of our shared identity.

By embedding these principles, we aim not only to develop individual staff but to cultivate a culture of belonging where every colleague feels seen, valued, and supported.

Writing SMART Objectives: A Practical Guide

This guide supports all staff and managers in creating high-quality SMART objectives as part of the performance development process. Well-crafted objectives provide clarity, purpose, and measurable outcomes that contribute to both individual growth and wider Trust priorities.

What Are SMART Objectives?

SMART is an acronym that helps structure goals, so they are clear and actionable:

- **Specific:** Be clear and precise about what you are trying to achieve. Avoid vague statements.
- **Measurable:** Define how progress and success will be tracked or evidenced.
- **Achievable:** Ensure the objective is realistic and within your role, skills, and available resources.
- **Relevant:** Align the objective with your team's, schools, or the Trust's strategic priorities and your personal development goals.
- **Time-bound:** Set a clear timeframe for completion or review.

Tips for Writing Strong SMART Objectives

When developing objectives, use these guiding questions:

- What exactly do I want to achieve and why?
- How will I measure progress or completion?
- Is it realistic given my current responsibilities and time?
- How does this connect to the team or Trust's goals?
- What's the deadline or review point?

Need Help Getting Started?

To support you in writing effective objectives, examples of SMART objectives and a template can be found in **Appendix B**.

Final Thought

SMART objectives are not a tick-box exercise, they are a tool for growth, collaboration, and progress. Use them to shape meaningful development conversations and take ownership of your performance journey.

If you're unsure whether your objective is SMART, consider discussing it with a colleague or your line manager for feedback and refinement.

Example SMART Objectives

Example 1

Objective	Implement a whole school reading strategy by July 2026, achieving a 10% increase in KS2 reading scores
Linked Priority	School Improvement Plan – Literacy
Success Criteria	<ul style="list-style-type: none"> At least a 10% increase in the proportion of pupils achieving age related expectations or above in KS2 reading assessments by July 2026. Whole school reading strategy fully implemented and evidenced in curriculum planning and classroom practice across all year groups. Termly internal monitoring (learning walks, book looks, pupil voice) shows consistent use of agreed reading strategies in at least 85% of classrooms. Pupil reading engagement improves, as measured by a 15% increase in positive responses in annual student reading surveys. Staff confidence and capability in delivering the strategy improves, demonstrated by post CPD feedback and coaching observations.
Actions to be taken	<ul style="list-style-type: none"> Audit current reading provision and identify areas for improvement across year groups by September 2025. Develop and launch a whole school reading strategy aligned with the School Improvement Plan by Autumn 2025. Deliver phased staff training on core reading strategies (e.g., fluency, inference, vocabulary development). Integrate agreed reading approaches into all relevant curriculum planning and lesson delivery. Implement termly internal monitoring (e.g., learning walks, book looks, pupil voice) to assess fidelity and impact. Track pupil progress through internal data cycles and adapt interventions or strategies as needed. Promote a reading culture through whole school initiatives, book events, and home school engagement.
Trust Commitments	<ul style="list-style-type: none"> Provide access to high quality CPD and external literacy consultants if needed. Offer support and coaching from English Leads or Specialist Leaders of Education (SLEs) across the Trust. Supply model materials, strategy templates, and monitoring tools to guide implementation. Monitor progress and impact through Trust level QA visits and network reviews. Celebrate and share effective practice across schools to build a reading focused community of learning.
Support/Professional Development Required	<ul style="list-style-type: none"> CPD in literacy leadership for key staff and whole staff training on evidence based reading strategies, including differentiation. Access to shared planning, moderation time, and coaching to support consistent and confident implementation. Opportunities to observe and learn from best practice in reading within and beyond the Trust.
Supporting Evidence	<ul style="list-style-type: none"> KS2 reading assessment data comparing baseline (2025) and outcome (2026) results. Internal monitoring documentation (learning walks, lesson observations, book scrutiny, pupil interviews). Completed staff CPD evaluations and impact reflections. Annual pupil surveys reflecting attitudes toward reading and perceived improvement. Strategy implementation tracker showing coverage and consistency across classes.
Review Dates	July 2026

Example 2

Objective	Introduce a retrieval practice strategy by Dec 2025 and evaluate its impact via student assessment results
Linked Priority	Teaching & Learning Strategy
Success Criteria	<ul style="list-style-type: none"> Retrieval practice strategy is implemented across all subjects by December 2025, with at least 80% of teaching staff using agreed approaches consistently (as evidenced in lesson observations and planning scrutiny). Average student assessment scores improve by at least 15% between baseline (pre strategy) and follow up assessments conducted at the end of Autumn 2. Pupil feedback indicates increased confidence in knowledge recall and understanding, with at least 70% of students reporting that retrieval strategies help them learn more effectively. Staff understanding and application of retrieval strategies improve, as shown in CPD evaluations and follow up coaching sessions. Departmental leads report evidence of impact and sustainability of practice in termly T&L review meetings.
Actions to be taken	<ul style="list-style-type: none"> Identify and agree on a whole school retrieval practice model with SLT and subject leads by September 2025. Deliver staff training on the agreed approach, ensuring understanding of purpose, design, and application. Embed retrieval strategies into curriculum planning and lesson design across all subjects. Carry out baseline student quizzes in September 2025 and follow up assessments in December 2025. Gather pupil feedback through surveys or focus groups to assess the impact of retrieval strategies on confidence and learning. Monitor implementation through lesson observations, book scrutiny, and staff discussions. Report findings in T&L review meetings and adjust approaches based on impact data.
Trust Commitments	<ul style="list-style-type: none"> Ensure all staff engage with high quality CPD on retrieval practice and cognitive science by the end of the Autumn Term, supported by practical guidance and assessment templates (shared by end of Autumn Term and finalised by end of Spring Term), along with half termly collaborative planning time from the Spring Term onwards. Provide leadership support and coaching to embed consistent and effective implementation, with coaching cycles beginning in the Spring Term, continuing through to the Summer Term, and including a structured mid-point review. Monitor, evaluate, and celebrate effective practice through existing QA and peer review systems, integrating this focus by the Summer Term and sharing case studies or examples of impact by the end of the academic year.
Support/Professional Development Required	<ul style="list-style-type: none"> Deliver whole staff and subject specific CPD on retrieval practice, starting in the Autumn Term and continuing through the year. Provide coaching from experienced staff, with relationships in place by Spring Term and regular check ins throughout the year. Ensure planning time and access to tools (e.g. question banks, platforms), with resources available by Autumn Term and reviewed termly.
Supporting Evidence	<ul style="list-style-type: none"> Pre/post quizzes and pupil feedback capturing changes in knowledge retention, recall, and learning confidence. Lesson observations, planning scrutiny, and departmental reviews evidencing use and impact of retrieval strategies.
Review Dates	December 2025 and July 2026

Example 3

Objective	Support targeted pupils in Year 4 to improve reading fluency and comprehension, resulting in at least 80% of the group making expected or better progress by July 2026.
Linked Priority	School Improvement Plan – Closing the Attainment Gap
Success Criteria	<ul style="list-style-type: none"> Identified pupils attend regular, structured reading interventions at least 3 times per week for a minimum of 10 weeks each term. At least 80% of pupils make expected or better progress in reading age by July 2026 (based on standardised assessment or teacher assessed levels). Weekly intervention records and progress notes are maintained and shared with the class teacher. Teachers report improved pupil engagement and participation in whole class reading activities. Pupil voice feedback shows increased confidence and enjoyment in reading.
Actions to be taken	<ul style="list-style-type: none"> Identify a target group of Year 4 pupils by September 2025, using assessment data and teacher input, with clear criteria such as a reading age below 6 years. Plan and deliver structured reading intervention sessions at least three times per week, focusing on fluency and comprehension. Keep weekly intervention records, including attendance, session content, and pupil responses. Liaise regularly with class teachers to align intervention strategies with classroom practice. Monitor pupil progress using baseline and termly reading assessments, and adjust interventions as needed. Gather pupil voice feedback at mid-year and year end points to evaluate impact on confidence and engagement.
Trust Commitments	<ul style="list-style-type: none"> Provide access to high quality intervention resources and phonics materials. Ensure time is allocated within the timetable for delivering consistent interventions. Offer training or modelling sessions led by the English Lead to support intervention quality. Facilitate regular check ins with the SENCO to review pupil progress and adapt strategies. Support release time for TAs/HLTAs to attend CPD and review sessions.
Support/Professional Development Required	<ul style="list-style-type: none"> Training in phonics intervention strategies Modelling from English Lead Time with SENCO to review progress data
Supporting Evidence	Baseline and end of year reading assessments; pupil progress tracking; intervention logs; teacher feedback
Review Dates	July 2026

Example 4

Objective	Ensure in year school budget remains within 2% of planned expenditure for 2025–26 through monthly monitoring and strategic reforecasting.
Linked Priority	Trust Strategic Plan – Financial Sustainability and Resource Efficiency
Success Criteria	<ul style="list-style-type: none"> • Monthly budget review meetings with the Executive Business Manager are held and documented from September 2025 to July 2026. • Any projected variances over 2% are identified early and addressed through reforecasting and agreed corrective action. • Budget remains within 2% of original forecast by year end (positive or negative variance). • All financial decisions must align with the School Development Plan (SDP), which should include clear costings to ensure that educational priorities are fully costed and directly linked to expected outcomes. • SRMSA return submitted accurately and on time, with actions followed up as required.
Actions to be taken	<ul style="list-style-type: none"> • Schedule and conduct monthly budget review meetings with the School Business Manager (SBM) from September 2025 to July 2026. • Monitor spending against budget lines and identify variances early. • Collaborate with the EBM (Executive Business Manager) to complete mid-year and end of year reforecasts. • Align financial decisions with the School Development Plan (SDP) priorities. • Review and submit the School Resource Management Self-Assessment (SRMSA) return by the Trust deadline. • Communicate financial priorities and constraints with SLT to ensure informed resource planning.
Trust Commitments	<ul style="list-style-type: none"> • Provide regular access to accurate, up to date financial reports through Trust finance systems. • Ensure timely support and guidance from the EBM for monthly monitoring and reforecasting. • Deliver training opportunities for Headteachers on interpreting financial data and making strategic financial decisions. • Facilitate opportunities for peer learning and collaboration around financial leadership across the Trust. • Support compliance with Trust wide financial reporting deadlines and processes.
Support/Professional Development Required	<ul style="list-style-type: none"> • Ongoing support from the EBM • Training on interpreting budget reports and reforecasting • Peer support from other Headteachers
Supporting Evidence	<ul style="list-style-type: none"> • Monthly budget monitoring reports • Year-end financial statement • Finance team feedback • School Resource Management Self-Assessment (SRMSA)
Review Dates	January 2026 and July 2026

Example 5

Objective	Strengthen the quality and consistency of team leadership and people management across the organisation by August 2026, ensuring all leaders and manager take full responsibility for leading and managing their staff effectively, supporting performance, wellbeing, and professional development.
Linked Priority	Trust Strategic Plan – People
Success Criteria	<ul style="list-style-type: none"> All leaders and managers hold regular one to one check ins with each of their team members, ensuring that performance and development conversations are clearly documented and followed up with appropriate actions. Managers across schools and central functions complete people management training and apply learning consistently within their teams. Staff feedback (via surveys or pulse checks) shows improved perceptions of leadership support, communication, and clarity of expectations (target: 10% improvement year on year). Performance issues are addressed proactively, and high performing staff are supported and retained across all functions. QA processes (e.g. leadership self-evaluation, staff feedback, audit reviews) confirm consistency in team management practices and leadership visibility.
Actions to be taken	<ul style="list-style-type: none"> Define clear expectations for line management and people leadership responsibilities in both school and central roles. Train all leaders and team managers in effective line management, feedback, coaching, and wellbeing support. Embed structured check ins and performance development conversations across all functions using a consistent framework. Enable regular reflection and feedback on leadership practice through team meetings, surveys, and QA processes. Identify and support talent within teams through development plans and succession discussions.
Trust Commitments	<ul style="list-style-type: none"> Provide high quality CPD and guidance on effective people management tailored to different leadership roles. Offer coaching or peer mentoring to build leadership capability across schools and central teams. Supply tools and templates to support effective conversations, development planning, and wellbeing check ins. Monitor leadership quality and team culture through QA, surveys, and performance development reviews. Recognise strong leadership behaviours that drive positive, inclusive team culture and staff engagement
Support/Professional Development Required	<ul style="list-style-type: none"> Training on performance development and inclusive leadership, supported by personal CPD profiles through systems like BlueSky. Peer networking, mentoring, and access to senior or HR support for complex people challenges. Protected time for leaders to reflect, plan, and engage with their development, informed by tools like BlueSky.
Supporting Evidence	<ul style="list-style-type: none"> Documented check ins and performance development conversations. CPD attendance records and evaluation feedback. Staff survey results related to leadership, support, and communication. QA outcomes (e.g. feedback from staff, audits, review meetings). Evidence of talent development and leadership pipeline activity across functions.
Review Dates	January 2026 and July 2026

Preparation Checklist for Review Meetings

This checklist supports high-quality preparation for all performance development conversations. It ensures that both staff and line managers approach each meeting – whether the initial objective-setting meeting or a mid-year review – with clarity, evidence, and purpose.

The process is designed to be developmental and inclusive. Preparation should reflect the staff member's current role, recent contributions, and aspirations, as well as the Trust's strategic priorities and values.

Preparation for All Staff (Continuing or New)

- Review the School Improvement Plan (SIP) and any relevant Trust strategic priorities.
- Reflect on your own role and how it has evolved or stayed consistent over the past year or term.
- Consider how your work aligns with the Trust's values and how you have contributed to an inclusive and collaborative culture.
- Identify recent achievements, challenges, and lessons learned.
- Gather feedback from relevant sources (e.g., manager, colleagues, students, stakeholders).
- Organise and bring relevant documentation, such as self-evaluations, CPD records, professional standards (e.g. Headteachers, Teachers, CIPD, CIPFA), or notes from previous reviews, to support a meaningful and informed development conversation.
- Reflect on your professional aspirations and consider the support you need to grow personally and thrive in your role.

Preparation for Line Managers

- Complete the required training to ensure you are prepared to conduct the performance development process effectively.
- Review the staff member's previous objectives, progress notes, and current role responsibilities.
- Analyse available performance evidence, including assessment data, lesson observations, operational metrics, or peer feedback.
- Note any significant changes to the staff member's responsibilities, working conditions, or external factors (e.g., long-term absence, new role).
- Draft initial thoughts on SMART objectives aligned to school improvement plans and the individual's development goals.
- Prepare to provide constructive feedback on the demonstration of Trust values and inclusive behaviour.
- Consider what support, CPD, or resources might enable the individual to meet their objectives and thrive in their role.
- Bring relevant documents, including previous review records and evidence sources to guide the conversation.

Performance Development Review Meeting Agenda and Prompts

This agenda provides a structured approach for performance development review meetings, consistent with the Trust's policy. It supports both the initial meeting of the cycle and any mid-year or end-of-cycle reviews.

Performance development meetings are an opportunity to engage in open, reflective, and forward-looking dialogue. They provide a dedicated space to evaluate progress, identify development needs, and agree new or revised objectives.

Meeting Agenda

1. Welcome and Purpose

Set a positive and collaborative tone for the meeting. Confirm the purpose: to review achievements and challenges, explore development opportunities, and agree objectives. Reiterate the focus on growth, development, and continuous improvement—not performance-related pay.

2. Review of Previous Objectives (if applicable)

Reflect on progress against agreed SMART objectives. Discuss key outcomes, strengths, and contributions. Identify supporting evidence (e.g., data, feedback, observation, documentation). Evaluate how objectives have supported school improvement priorities.

3. Challenges and Barriers

Explore any internal or external factors that may have impacted progress. Identify barriers (e.g., time, capacity, access to resources). Discuss how these challenges were addressed or mitigated and what support may be needed.

4. Values and Inclusive Behaviours

Reflect on how Trust values have been demonstrated in practice. Consider the individual's contribution to an inclusive, respectful, and collaborative working culture. Encourage examples aligned with the Trust's DIB (Diversity, Inclusion, and Belonging) commitments.

5. Professional Development and Support

Review any professional development accessed and its impact on practice. Identify further development needs linked to the role, career aspirations, or emerging priorities. Agree what support (e.g., coaching, mentoring, shadowing, training) would be beneficial.

6. Objective Setting or Adjustment

For new cycles, agree no more than four SMART objectives across key areas:

- Organisational / School Improvement alignment
- Professional Standards or role expectations

- Personal or career development
- Inclusive behaviour / values

For mid-year reviews, assess continued relevance and revise objectives where needed. Ensure objectives are realistic, measurable, and meaningful.

7. Summary and Next Steps

Summarise key discussion points and any agreed actions. Confirm expectations for the next termly check in. Reaffirm the individual's strengths and their value to the school or Trust. Share a copy of the completed review documentation using the Trust's standard template.

Suggested Prompts for Managers

- What are you most proud of from the last term/year?
- Which objective felt most achievable or most challenging? Why?
- What supported your success? What made it difficult?
- How have you contributed to a positive, inclusive team or school culture?
- What feedback have you received that has helped you reflect on or adapt your approach?
- What professional development would support you in this role, or in your future goals?
- Are there any barriers you would like help with addressing this term?