

Guidance for mid-year reviews of headteachers' appraisal targets

The **NGA** document [Governing in challenging circumstances Business continuity and holding virtual meetings](#) includes the following in its Frequently Asked Questions section:

'How does the board manage the performance management/appraisal process for the head teacher, should this be put on hold?'

Whilst it isn't necessary to place the performance management/appraisal process for the head teacher on hold completely (and in doing so create unintended issues relating to future pay decisions), it is likely to be the case that their objectives will be adversely affected by the inability to work towards them during a substantial part of the performance management cycle/appraisal. Bearing this and the other pressures faced by school leaders as a result of COVID-19 in mind, it is very important that governing boards have a flexible response. We recommend that a conversation takes place between the head teacher and those governors/trustees involved in the process to establish how best proceed.

Gloucestershire County Council Guidance:

In conducting an interim review of a headteacher's appraisal targets the governors on the headteacher's performance management panel should be mindful of:

- How to conduct the meeting while observing social distancing. If this is a virtual meeting, then ensure that the video conferencing platform is GDPR compliant.
- How current circumstances may affect the headteacher's availability and participation in the meeting – including their work-life balance (they may not have had an Easter break nor had time to reflect on, or gather evidence about, their performance management objectives); their health status; how well they can conduct a confidential meeting if they happen to be self-isolating or working from home.
- Placing a high priority on checking on the headteacher's well-being. These are unprecedented times and the current arrangements during partial school closures are likely to have placed a lot of strain on headteachers. They will have been focused on the safety and well-being of their staff and pupils: this is a key opportunity to ensure a focus on the headteacher's own well-being and work-life balance.
- Reviewing objectives and the progress that had been made before school closures, but also discussing their relevance for the foreseeable future. Are these still the right priorities or is it best to put some objectives on hold until circumstances change? What factors might impact on how well certain objectives can be addressed during school closure or the evidence that is/will be available to monitor progress? Are there some objectives, or elements of some objectives, which could still be worked on? Is it appropriate to revise objectives or replace one or more with new ones?
- There will be no statutory results this year against which to measure the success of pupil outcome objectives, and the [DfE school accountability document](#) states that 'Schools and colleges should not use the 2020 exams data as part of their teacher performance management process.'

- Consider arranging a further meeting date (perhaps once the school re-opens, depending on the time-scale) to consider again the relevance of the objectives and what the headteacher's priorities should be.