



**St Edward's  
School**

Unity - Achievement - Faith

# **STAFF APPRAISAL 2021-22**

**Original Policy: October 2016**

**Revised Policy Staff consultation: June 2021**

**SLT approved: June 2021**

**Reviewed and Approved by Pay Committee**

**On: 29<sup>th</sup> June 2021**

**Reviewed and Ratified by the Full Governing Body**

**On: 15<sup>th</sup> July 2021**

**Next review date: Summer 2022**

SLT are responsible for oversight of this policy's implementation

## **This policy is to be read in conjunction with the BCP Model Pay Policy**

### **Mission Statement**

#### **MAY WE BE ONE**

In purpose – educating for life in all its fullness

In faith – encountering God who lives among us, calling us to unity

In dignity – nurturing confidence and maturity

In community – striving together for justice, love and peace

### **INTRODUCTION**

The aim of appraisal processes at St Edward's School is to develop and encourage a culture in which all members of staff are supported to take responsibility for improving their performance by appropriate professional development linked to the school's improvement priorities and development plan. It is the firm belief of the school that every one of its staff is capable of excellence, and commits itself to supporting each member of our staff community towards this.

This policy sets out the framework for a clear and consistent assessment of the overall performance of teachers, including the head teacher, and for support staff. The governors at St Edward's School recognise that there is no nationally agreed system of appraisal for support staff but wish to recognise the contribution that each member of the support staff makes to the school by noting individual achievements and agreeing future areas of development.

In reflecting our school mission we work collaboratively as a staff body. We strive to respect all in a way that helps each member of our community to develop to their full potential, as we seek to work with the students in our care.

### **PURPOSE**

The performance of the appraisal process is designed to:

- Provide feedback on performance and set objectives for the year ahead
- Secure expected standards of performance
- Ensure that the line manager and employee are clear about the purpose of their role
- Help employees see how their role fits with the overall school aims/development plans
- Enable the line manager to plan how the development needs of team members will be provided for
- Secure the professional knowledge, understanding and skills required for the role
- Help to support employees to progress in their chosen career

The process should be one where each staff member is affirmed and participates fully in an honest assessment which promotes a reflective and developmental school body. Although part of the school system it is important that appraisal is owned by the person and not regarded as something done to him or her.

### **TIMETABLE**

The staff performance management appraisal period runs for 12 months from 1 September to 31 August and must be completed by 30 September with agreed reviews taking place during the year. This is to allow moderation processes to take place, and pay recommendations to be considered before the legal deadline of 31<sup>st</sup> October of each year.

Once the review and planning of targets/objectives and/or development plan is agreed between the appraiser and appraisee, a copy must be sent to the HR Manager by 30 September at the latest.

The Appraisee must have access to appropriate professional development for support and development agreed.

### **APPRAISERS**

This will usually be the line manager. The appraisee has the right to request an alternative appraiser, and should raise this with the Headteacher if needed.

### **APPRAISAL MEETING REVIEW**

#### **Purpose**

The appraisal meeting is an opportunity for a 2 way conversation to recognise the contribution made by an individual over the preceding 12 months, the time to agree aspects of performance that will be central to becoming an outstanding practitioner, and identification of the means by which this will be provided.

#### **Professional Review**

A staff member should be invited to reflect on their performance through the previous year. Where there is a dual role, such as teacher/Form Tutor, both elements will be considered. It will be assumed that if performance is not meeting the relevant professional standards, this will have been raised, and secured, within the previous review cycle. At all times, staff are expected to know the standards of performance expected of their role, and to commit themselves to securing and sustaining these.

#### **Summary of discussion**

A short summary of the conversation should be agreed and noted. Performance should have been discussed on an ongoing basis throughout the year and therefore this part of the appraisal interview should be a recap of previous discussions that have taken place. As with any performance management process, there should be 'no surprises'.

### **APPLICATION OF THE POLICY TO TEACHERS**

This part of the policy applies to the head teacher and to all teachers employed by the school or local authority, except those on contracts of less than one term, those undergoing induction (i.e. ECTs) and those who are subject to the school's capability policy. Teaching involves more than just outstanding subject knowledge; it requires high levels of skill in transmitting knowledge and understanding via effective pedagogy, coupled with a deep understanding of the "spirit of the child", as a young human being, in the early stages of adult formation:

"Teaching, as a work of love, requires a radical commitment and service from all teachers, whatever their faith and whatever point they have reached on their spiritual journey. (...) Through you, as through a clear window on a sunny day, students must come to see and know the richness and joy of a life lived in accordance with Christ's teaching, in response to his challenging demands. To teach means not only to impart what we know, but also to reveal who we are by living what we believe. It is this latter lesson which tends to last the longest." *Catholic Education Service*

Teaching staff were consulted on this policy in the Summer term of the academic year 2020-21.

## **PURPOSE**

The purpose of appraisal is to:

- Confirming that a teacher meets the relevant professional standards, the core standards being the Teachers' Standards 2012.
- Identify and celebrate the professional strengths of individual staff
- Establish and implement means by which those personal and professional strengths can be shared and developed amongst peers
- Identify any areas for professional development of individual staff, in a systematic way based on reflection and performance indicators
- Establish and implement professional development plans for individual staff
- Consider and plan for individual career development support
- Ultimately to allow individual staff members to experience greater professional success resulting in even better outcomes for students, and job satisfaction.

For teachers the starting point of the process is a clear and objective analysis of professional attributes and practice based on evidence. The Appraisal meeting will assume that the Teacher has reflected upon the Teacher Standards 2012, the UPR Standards, Standards for Subject Leaders, Director of Learning, TLR posts and Tutor Standards (as relevant) using identified evidence sources *in advance*; and that any significant concerns regarding these will already have been addressed and secured in the previous Academic Year. The greater and more honest the reflection, the better the provision for further professional development will be.

Appraisal, the meeting of the relevant standards, and the pursuit of pay progression is the responsibility of the individual teacher.

## **PROCESS FOR TEACHERS**

### **APPRAISAL PERIOD**

Appraisal evaluates a teacher's performance in an Academic Year, and includes an in-year progress review, and completion of the formal review by the end of September. Teachers who are employed on a fixed term contract of less than one year will have their performance managed in accordance with the principles underpinning this policy. The length of the review period will be determined by the duration of their contract.

### **APPOINTING APPRAISERS**

#### **The Headteacher**

The Headteacher will be appraised by the Governing Body, supported by a suitably skilled and/or experienced external adviser who has been appointed by the Governing Body for that purpose. The external adviser must be familiar with the particular needs of a joint church school, for instance the development of the school's ethos. The Governing Body may also consider seeking advice from another external adviser, for instance from the dioceses. In this school the task of appraising the head teacher, including the setting of objectives, will be delegated to a sub-group consisting of three members of the Governing Body, 'The Headteacher's Performance Management Committee'.

#### **Teachers**

The Headteacher will decide who will appraise other teachers, and this will usually be the line-manager.

## REVIEW AND TARGET-SETTING

All appraisers are expected to monitor the extent to which the teacher meets the relevant standards (Main-Scale, UPR, Leadership), as a normal part of day to day line management, arising from their role in the school. Teachers should be formed as reflective practitioners. They should proactively, and frequently, seek feedback from their students, so that they understand how better to help them.

They should also seek feedback from colleagues, and especially those who are in a position to help them to grow professionally. An individual teacher is not the sole contributor towards students' examination grades, and whilst these are very important, the teacher should reflect on other aspects of their role including how they managed learning behaviour; how they contributed towards a child's development; how they supported the professional development of others; how they communicated with and supported other stakeholders, such as parents and carers, and Governors; how they led the spiritual development of young people by leading daily prayer and reflection in their role as Form Tutor; how they contributed towards the wider life of the school.

The professional development areas agreed for each teacher will, if secured, contribute to the school's plans for building the school's educational provision and performance to an outstanding level, and improving the life chances of students. Student progress and development is to be understood within the wider Christian nature of the school and include spiritual, moral and social development of each young person. This ensures that appraisal is set within the context of the school's joint Church ethos, and ensures that it is developed and maintained. TLR holders are expected to know what constitutes outstanding provision in areas under their care, and to be swiftly and effectively securing such standards. They will receive separate targets relevant to the purpose of their TLR, which will be reviewed within the appraisal meeting.

## TIMETABLE (See Appendix C)

SEPTEMBER / OCTOBER – AGREEING THE PLANNED IMPROVEMENTS IN PERFORMANCE FOR THE YEAR AHEAD

**Appraisal meeting:** this should be informed by the Appraiser and teacher's prior reflection, which will include celebration of the strengths, successes and achievements of the individual staff member.

The meeting of the Teachers' Standards 2012 and other relevant standards will be assumed and processes for managing under-performance are detailed in a separate policy document. Beyond the ambition to become an outstanding teacher, the setting of performance targets will incorporate:

- The requirement for teachers being paid on the upper pay range (UPR) to demonstrate evidence of their higher skills, wider contribution to the school and greater experience.
- The requirement for those approaching UPR to demonstrate UPR standards, in addition to the Teachers' Standards, for the two years prior to being given access to the Upper Pay Range.
- The need to ensure that leaders and managers in receipt of a TLR demonstrate and develop their skills in these pivotal roles.
- The individual's own career aspirations

Teachers' Standards, (and UPR standards where relevant) apply to all teaching practice, and will need to be demonstrated as a general feature of teaching practice. The review, and areas for professional development should be agreed by the 'Appraiser' and 'Appraisee'. Where agreement cannot be achieved, the matter should be referred to the next post holder above the Appraiser in the line management structure and ultimately to the Headteacher. Where negotiation does not result in consensus, the Headteacher's decision is final. The review document is in **Appendix H**.

Part-time teachers are required to demonstrate the relevant standards to the same extent as full-time teachers.

Once review and planning is agreed the recommendation will be referred to the relevant departmental line manager / SLT member for moderation. The Appraisee must have access to appropriate professional development for support and development agreed, and the AHT responsible for staff development will coordinate such opportunities during the year ahead.

### **SPRING TERM – INTERIM MEETING**

There must be an interim meeting with the appraisee's line manager to review the work of teachers in the light of performance in the autumn and spring terms, and this may include current student progress data, together with any additional data, such as expected departmental outcomes, and the performance trend of the subject over time. Although lesson observations are an important indicator of learning over time, an individual lesson observation serves principally to inform a discussion between the Observer and the teacher, for professional development purposes.

Line-Managers are expected to make frequent visits to lessons of their teams, to invite visits from their colleagues, to sample student voice; to evaluate the impact of teacher assessment; the contribution to the team, and wider work of the department appropriate to the teacher's pay and experience; and compliance with departmental policies and procedures. The monitoring and management of standards is a day-to day task expected of managers, and enables swift intervention, and securing of standards if necessary.

The fundamental aim of all observations of learning and contributory elements, is to create an opportunity for professional reflection on teaching and learning; to affirm good practice and to identify professional development needs. Looking at teaching, assessments, and interactions with students provide a secondary function of enabling standards to be evidenced, and to identify support and intervention if needed.

### **THE FOLLOWING JUNE/JULY AND SEPTEMBER**

This should take a provisional look, using available evidence, that the teacher meets the required standards, and the impact of professional development undertaken. The final appraisal recommendation(s) will be made once examination results are known in September. The prime focus of the June/July professional reflection is to consider developments in one's own professional practice and the impact on teaching and learning, plus the early identification of likely further development areas and opportunities needed for the new academic year.

The teacher's line manager makes a recommendation for pay progression as part of the performance review. "Double-jump" award recommendations may not be made by line-managers.

**Standard:** Pay progression (if applicable) will be recommended where a teacher meets or exceeds all of the relevant standards at the appropriate level in their day to day work.

**Reduced** performance is where one or more standards are not met in day to day work, or where performance against the purpose of the TLR is not satisfactory; and will result in pay progression for one year with standard performance to be achieved and sustained from the following year. Sustained reduced performance for a second year will invoke capability processes if this has not already happened, and no pay progression.

It is expected that underperformance will be addressed, and supported or further challenged by line-managers within the normal operations of the school year, using the relevant formal processes if necessary.

A teacher not meeting one or more of the relevant Teachers' standards, or under-performing as a TLR holder, will commence informal capability procedures. Formal processes will be invoked where performance does not improve, and/or is not sustained, despite support.

### **Recommending pay progression:**

Recommendation of pay progression by the Appraiser implicitly affirms that the teacher is meeting and sustaining the Teacher Standards 2012. Pay progression within the UPR implicitly expects the sustained meeting of UPR standards and performance at UPR level. Retention of a TLR implicitly expects continued secure performance as a TLR holder.

The teacher will receive a written appraisal report and have the opportunity to comment in writing. TLR holders are similarly accountable for their performance under the terms of their responsibility. This will be evaluated against the relevant standards (where applicable), and/or the expectations of performance within the role.

### **EVIDENCE**

Evidence of meeting relevant standards can come from a variety of sources that are part and parcel of normal monitoring, including progress data, lesson observation, student voice, assessment review, lesson planning evidence etc. One evidence source might demonstrate the meeting of more than one standard. It is important to 'triangulate' the judgement about the meeting of standards.

Evidence should be objectively verifiable if necessary; and the accuracy of the line-manager's judgement is itself indicative of the effectiveness of their managerial role.

The line-manager is principally responsible for evidence that the Appraisee is meeting the Teacher Standards 2012, and other relevant standards, as a norm throughout the year.

Appraisees are strongly recommended to regularly seek, and listen to student voice as a reflective practitioner, in learning how to better meet the needs of all learners; given that this task is fundamental to the Teacher's role.

### **LEARNING OBSERVATIONS**

Formal learning observations may be carried out by those with QTS, and will usually be the line-manager, another leader or a member of the SLT. Informal lesson observations are the preferred norm. There is no limit on the number of learning observations that may be undertaken, and some teachers may want to be observed more than others especially if they are working on the development of a particular skill.

Some observations may be for only part of a lesson in order to look at a particular aspect of teaching and learning. All teachers should expect to have visits to their classes as a norm as part of whole-school quality assurance, and in order that all teachers have the opportunity to receive feedback and professional development. Beyond management, visits to the lessons of another colleague need to be arranged in advance, as a courtesy.

Teachers new to the school will be additionally observed as part of induction processes early in the academic year.

In addition to formal observation, the Headteacher or other leaders with responsibility for teaching standards may 'drop in' in order to:

- provide support for staff and to be a presence around the school
- to evaluate the overall standards of teaching
- to ensure that professional expectations are established and maintained
- to monitor the impact of marking and feedback on student progress

The length and frequency of ‘drop in’ observations will vary depending on specific circumstances. The SLT will aim to provide a short piece of feedback following the visit. Departmental leaders may also drop-in as part of their monitoring and quality assurance processes. Examples of quality assurance forms for observations and audits are in Appendix B.

### **CONTINUING PROFESSIONAL DEVELOPMENT**

The school aims to encourage a culture of outstanding practice, in which all teachers take responsibility for improving their teaching through appropriate professional development. Leaders and managers are also expected to seek to become better at what they do, and to apply their insights to the good of all in our community. Professional development will be linked to school and team improvement priorities and to the on-going professional development needs and priorities of individual teachers.

### **IN-YEAR CONCERNS**

Teachers will receive constructive feedback on their performance throughout the year and as soon as practicable after observation has taken place or other evidence has come to light. Feedback may highlight particular areas of requiring attention not previously recognised. Learning observations that suggest that practice is less than secure will be re-visited within two weeks. If the second observation does not indicate improvement likely to be sustained, then the appraiser and/or the observer will meet the teacher to

- give clear feedback to the teacher about the nature and seriousness of the concerns
- give the teacher the opportunity to comment and discuss the concerns
- agree any support (e.g. coaching, mentoring, structured observations), that will be provided to help address those specific concerns
- make clear how, and by when, the appraiser will review progress (it may be appropriate to revise objectives, and it will be necessary to allow sufficient time for improvement. The amount of time is up to the school but should reflect the seriousness of the concerns);
- explain the implications and process if no – or insufficient – improvement is made.

When progress is reviewed, if the appraiser is satisfied that the teacher has made, or is making, sufficient improvement, the appraisal process will continue as normal, with any remaining issues continuing to be addressed through that process. Any improvements will be expected to be sustained. Concerns about performance of TLR holders will also follow the sequence above.

### **TRANSITION TO CAPABILITY** (see flowchart ‘PROCEDURES FOR PERSISTENT UNDERPERFORMANCE’ in Appendix B)

If the appraiser is not satisfied with progress, the teacher will be notified in writing that the appraisal system will no longer apply and that their performance will be managed under the capability procedure. The capability procedures will be conducted in accordance with the BCP capability policy and procedures for Teachers adopted by the Governing Body.

### **UPPER PAY RANGE (UPR) PROCEDURES**

A teacher seeking to move to the Upper Pay Range from main-scale must do so by applying to the Headteacher in writing. Full details are in Appendix One of the Model Pay Policy found on Q drive. For progression to the UPR s/he must be able to identify the appraisal evidence that points to clear differentiation between main and upper pay expectations as listed in the school’s UPR Standards over the



previous two years. In addition the appraisal outcomes should show that the teacher has been meeting UPR standards through the previous two years' appraisal cycles.

Applications should be submitted by 30 September and decisions will be made by 31 October and if the UPR standard is achieved pay will be backdated to 1 September. *Late applications will not be considered.*

The normal procedure would be that teachers will be at pay scale M4 before they begin planning to transfer to the Upper Pay Range. There may be exceptional circumstances, however, when this process could be brought forward.

Movements within the UPR range may be considered every two years, as this is the minimum period necessary to demonstrate performance that is substantial and *sustained*. This takes place within normal appraisal processes, and does not require a further application in writing. Applications outside of this will be considered in exceptional circumstances at the discretion of the Headteacher.

The application form is in **Appendix D**.

## **APPLICATION OF THE POLICY TO SUPPORT STAFF**

Support staff equally share the mission of the school to become an outstanding centre of learning and formation of the human person. The School cares about the professional development of all of its staff; and wants them to enjoy the part that they play in an outstanding place of learning. Support staff may be supported to better perform their current role, to acquire new skills, or to prepare for a promotion opportunity should it arise.

Support staff managers are expected to have a clear vision of “outstanding” provision within their sector, and to have the ability to support and challenge team colleagues in achieving the necessary standards.

The system for appraisal of support staff broadly follows the system of appraisal for the teaching staff, which is regulated by the DFE. The aim is to develop and encourage a culture in which all members of staff take responsibility for, and are supported in developing their performance to an outstanding standard.

Appraisal is intended to be a supportive process devised to ensure that all support staff have the skills and support they need to fulfil their role and develop their potential, both in terms of the priorities of the school development plan and personal professional development.

The policy applies to all members of support staff employed by the school, except those on contracts of less than one term or those on the probationary review process. Members of staff who are employed on a fixed-term contract or supply arrangement of at least one term but less than one year will be appraised in accordance with the principles underpinning this policy, the length of the appraisal period being determined by the duration of their contract.

The Head Teacher is responsible for overseeing this policy and its correct implementation but may delegate this responsibility to a member of the senior leadership team or other senior/middle manager. In practice, the appraisal of support staff is overseen by the School Business Manager.

This policy sets out the framework for a clear and consistent assessment of the overall performance of support staff and for supporting their development within the context of the school's plan for improving

educational provision and performance. This policy should be read in conjunction with the adopted Pay Policy. Relevant documents are in **Appendices E and F**.

There are a number of specific aspects to working for the school which managers should ensure that their staff are competent to deal with. These will vary depending on the role which the employee undertakes, but may include some of the following:

- Identified school priorities
- Student outcomes
- Developing students' skills for life
- Data Protection and Information Security
- Safeguarding Young People
- Financial Integrity
- Health and Safety
- Equality and Diversity

## **OBJECTIVES**

### **Purpose**

As part of the appraisal process individual job targets will be agreed between the manager and an employee.

### **Objectives**

The objectives should be derived from the employee's job description and the school development plan. Targets may also relate to skills, behaviours or competencies required for the role or an existing development need.

Each member of staff will normally have a minimum of 4 objectives (maximum 6); at least 2 of these will be linked to the school development plan and 1 to the individual's career development aspirations.

The objectives should be **SMART**

- Specific:** objectives should specify what they want to achieve.
- Measurable:** be able to measure whether the objectives are being met.
- Achievable:** are the objectives set, achievable and attainable?
- Realistic:** can they realistically achieve the objectives?
- Time:** when do the set objectives need to be met?

The appraiser and member of staff will normally seek to agree the objectives but, if that is not possible, the appraiser will determine the objectives(s). The appraisee may record their comments in writing as an appendix. Objectives may be revised if circumstances change.

The Headteacher's designated member of staff; normally the Business Manager, will monitor objectives to ensure consistency and relevance, both to the school development plan and to the individual.

### **Performance Measures**

A performance measure should show whether a target is being met. The manager and an employee should set the measure jointly so there is an agreed understanding of what good service/performance looks like.

The collection of evidence to support the measurement should be easy to collate so that it does not become an onerous or time consuming activity.

Members of staff should expect to have their performance observed and assessed during the year and will receive constructive feedback on their performance throughout the year. Feedback will highlight particular areas of strength as well as any areas that need attention that will normally be dealt with under the appraisal process. However, if persistent inadequacies in any aspect of the member of staff's performance are identified at any time then the school's formal competency procedure will begin.

**Target Completion Date** - This date should be jointly agreed and monitored during review sessions.

**Comments to support any changes made throughout the year** - Progress towards achieving targets/outcomes should be discussed during regular meetings as appropriate. Some targets may need to be amended to reflect a change in policies, circumstances, school priorities during the course of the year – if this occurs the changes should be recorded in this section.

**Employee Signature** – to confirm employee's acceptance of the objectives, performance measures and target completion dates.

**Date** – Date signed

**Line managers Signature**– to confirm objectives, performance measures and target completion dates.

**Date** – Date Signed

**Any other Comments** – any other relevant comments/items discussed.

## **PERSONAL DEVELOPMENT PLAN**

### **Purpose**

A Personal Development Plan (PDP) identifies an employee's development and learning needs to enable them to:

- Deliver their job targets
- Develop their teamwork, leadership and/or managerial qualities, as appropriate.
- Match their behaviours and style of working to the school's values
- Develop their experience and skills to meet longer term job requirements or career aspirations, where these are compatible with School development Plan.

### **Generic Development Need**

The generic development need will be identified at a high level and will indicate the general area of need i.e. Information Technology.

### **Specific Activity Required**

The specific activity can be identified and should address the specific need required

### **How will this need be met?**

Please indicate the type of event required – i.e. training course, coaching, work shadowing, mentoring/buddying etc.

**Will the cost be met from your budget?**

Have funds been assigned for this activity – Yes/No

**When does this need to be achieved by.**

Please indicate whether the requirement is time dependant.

**ASSESSMENT**

At the end of the appraisal year, time will be provided for staff to conduct a self-audit with reference to relevant occupational standards, job descriptions, person specifications and the objectives set at the beginning of the appraisal year. Self-appraisal provides an opportunity for appraisees to reflect upon their work, to consider positive and negative aspects of it, and to identify development needs.

Before the appraisal interview, each appraisee will complete the self-appraisal form (see appendix A) and take it to their appraisal meeting. The appraisee should review his/her job description before the appraisal meeting.

Each appraiser will similarly complete an audit of the appraisee's performance over the year. Appraisers should obtain a copy of the appraisee's job description. Where the appraiser indicates that performance is unsatisfactory, they will need to be in a position to back up their judgement by reference to written evidence previously shared with the member of staff.

Successful appraisal interviews need:

- Careful forethought.
- An agreed agenda, including an introduction by the appraiser to clarify the purpose of the interview.
- To be conducted in a calm atmosphere.
- Uninterrupted time.

The purpose of the meeting is to consider:

- The appraisee's job description.
- The appraisee's answers to the questions in the self-appraisal form.
- Whether objectives from the previous appraisal meeting have been achieved.
- Whether professional development recommendations from the previous appraisal meeting have been undertaken.
- Setting objectives for the coming year.
- Determining any professional development requirements.
- Any other points either party may wish to discuss.

Where appraisee and appraiser cannot reach agreement on any matter then it will be referred to the Headteacher's designated member of staff; normally the Business Manager, who will meet with the appraisee, consider all available evidence, and inform the appraisee of their decision. The objectives decided at or following the appraisal meeting will form the basis of the annual appraisal statement (see appendix B).

The appraisal document will include:

- Details of the member of staff's objectives for the appraisal period in question.
- An assessment of the member of staff's performance of their role and responsibilities against their objectives and the relevant standards.
- An assessment of the member of staff's training and development needs and identification of any action that should be taken to address them.
- A recommendation on pay where that is relevant.
- Any other comments considered to be of value.

The assessment of performance and of training and development needs will form the basis for assessment of the appraisee during the next appraisal period.

## **MID YEAR APPRAISAL REVIEW**

### **Purpose**

A mid-year review of progress towards objectives should be carried out as a minimum if monthly review meetings are not possible.

It is important that the personal development plan is reviewed on a regular basis during 1-to-1 meetings to ensure that both the manager and the employee have an opportunity to discuss progress towards achievement of the plan. As a result of these discussions the original plan can be amended or added to as appropriate.

## **CONTINUING PROFESSIONAL DEVELOPMENT**

The school wishes to encourage a culture in which all staff take responsibility for improving their contribution through appropriate professional development. Professional development will be linked to school and team improvement priorities and to the on-going professional development needs and priorities of individuals.

## **MONITORING & EVALUATION**

The Headteacher will discuss progress on support staff appraisal with the Business Manager at least annually and provide an annual report to the Governors on how effective the procedures have been, including any relevant issues such as underperformance arising from the annual review cycle and on any action required to address those issues. The report will enable Governors to receive an overall general report of the process but will not include specific details relating to individual members of staff.

The governors monitor the policy on an annual basis and will evaluate its effectiveness in light of any incidents which arise through its implementation.

## **IN-YEAR CONCERNS**

Staff will receive constructive feedback on their performance throughout the year and as soon as practicable after observation or other evidence has come to light. Feedback may highlight particular areas of requiring attention not previously recognised and may:

- give clear feedback to the member of staff about the nature and seriousness of the concerns
- give the member of staff the opportunity to comment and discuss the concerns
- agree any support (e.g. coaching, mentoring), that will be provided to help address those specific concerns

- make clear how, and by when, the appraiser will review progress (it may be appropriate to revise objectives, and it will be necessary to allow sufficient time for improvement. The amount of time is up to the school but should reflect the seriousness of the concerns);
- explain the implications and process if no – or insufficient – improvement is made.

When progress is reviewed, if the appraiser is satisfied that the member of staff has made, or is making, sufficient improvement, the appraisal process will continue as normal, with any remaining issues continuing to be addressed through that process. Any improvements will be expected to be sustained.

### **TRANSITION TO CAPABILITY**

Where there are concerns about any aspects of an individual's performance, which do not improve after feedback, then competency procedures will be undertaken using the BCP capability policy and procedures for support staff.

Access to the written appraisal statement will normally be limited to the appraisee, the appraiser, the Head Teacher and/or nominated member of the senior management team, in the case of St Edward's school support staff this will be the School Business Manager. The principles and provisions of the Data Protection Act 1998 will be followed at all times by those who have access to the documents. The governors responsible for taking decisions, or making recommendations, regarding pay, promotion, dismissal or disciplinary matters may also request access to the copy of the appraisal document.

The governing body is committed to ensuring consistency of treatment and fairness and will abide by all relevant equality legislation.

If the appraiser is not satisfied with progress, following a meeting with the member of staff and the Headteacher / designated member of staff i.e. Business Manager, the member of staff will be notified in writing, that the appraisal system will no longer apply and that their performance will be managed under the capability procedure. The capability procedures will be conducted in accordance with the BCP capability policy and procedures for support staff adopted by the governing body.

*This policy has undergone an Equalities Impact Assessment in line with the requirements of the Public Sector Equality Duty.*