Appraisal policy and procedure – support staff

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Signed:		
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1. Introduction and scope

1.1 This policy and procedure forms part of the Governing Board's overall commitment to support and challenge employees in their performance management.

1.2 The purpose of this policy and procedure is to ensure that everyone understands and achieves school goals and individual outcomes, including ongoing personal development. This will ensure that everyone understands how their job relates to these objectives through their individual objectives.

1.3 The Headteacher is responsible for overseeing and ensuring correct implementation of this policy and procedure.

1.4 This policy and procedure applies to all support staff employees.

1.5 It is important that **all** employees in scope of this policy and procedure make a commitment to making the appraisal process a success, ensuring it is a two-way process that benefits the employee and the employer.

1.6 There are no regulations, local or national agreements regarding appraisals for support staff. This policy and procedure provides an appropriate framework for support staff appraisal discussions.

1.7 The *Appraisal process flowchart – support staff G324b* provides an overview of how the appraisal process works.

2. Equalities and support

2.1 The Headteacher will ensure that all reasonable adjustments or supportive measures are considered to allow equality of access and opportunity regardless of age; disability; gender reassignment; marriage and civil partnership; pregnancy and maternity; race; religion or belief; sex; or sexual orientation.

2.2 Through the implementation of this policy, the Governing Board will be mindful of their obligation to seek to maintain and protect the mental health and wellbeing of all staff as far as is reasonably practicable.

2.3 According to ACAS it is estimated one in seven people are neurodivergent, meaning that the brain functions, learns and processes information uniquely. Where an employee discloses neurodiversity, the Governing Board understands the employee may require extra support in relation to the application of this policy. Where reasonable adjustments are necessary and can be accommodated, the Headteacher will support these.

3. The appraisal process

3.1 Performance appraisal ensures employees are clear about their role, desired outcomes and priorities in their work. It is an opportunity to agree a set of coherent, motivating objectives/goals which align with the school improvement and development plan, the staff development plan, the most recent Ofsted report, plus other relevant reports and plans. Appraisal discussions give employees a clear idea of how their job performance is viewed, based on feedback and evidence not only from their Headteacher and/or manager, but also pupils, parents and partner organisations (e.g. suppliers) where applicable.

4. Incremental progression

4.1 The local Green Book terms and conditions (MRS Local Collective Agreement) provide arrangements for automatic increments for support staff (where the employee is not already at the top of their grade), unless the employee is being managed through the capability procedure. There is a clear expectation that any employee being supported in the capability procedure would have a Level 1 appraisal assessment, but it is the capability procedure rather than the appraisal assessment that determines whether an increment should be awarded.

4.2 Where increments are withheld, the appraisal cycle needs to be set such that any need to withhold an increment can be identified in advance of the annual increment date of 1 July. This is likely to mean that the appraisal cycle will start with a first appraisal meeting around April (to discuss performance over the past year and agree objectives for the coming year) with documentation being completed by 31 May. The HR/Payroll provider must be formally notified of this decision, by the end of June, so that appropriate pay adjustments can be made.

4.3 If an employee's rating means they will not get an increment, it should be made clear to them that their increment will be withheld until such time as they have been through an appraisal cycle with satisfactory or better performance.

5. Roles within the appraisal process

5.1 There are a number of roles required to be carried out under the appraisal process. These roles are referred to throughout the procedure.

The Employee is the individual whose performance is being appraised.

The Appraiser will be a manager identified as responsible for conducting the appraisal.

The Reviewing Officer will take an overview of all support staff appraisals in the school or an identified area of the school (e.g. a department in a high school). They will check for consistency across appraisals and monitor quality. The role of Reviewing Officer could be undertaken by the Headteacher unless the Headteacher is the Appraiser, in which case, the role of Reviewing Officer could be undertaken by a nominated governor.

5.2 For roles and responsibilities specific to the Employee, Appraiser and Reviewing Officer, see Appendix 1.

6. Appraisal cycle

6.1 The appraisal cycle will be completed by 31 May each year, with a mid-year review six months later. However, where an employee is subject to the Capability Procedure and may not receive their annual increment, the appraisal will be completed by 30 April.

Strategy consideration - The annual cycle may need to be different if employees are employed under conditions involving annual incremental progression other than on 1 July.

7. Preparing for appraisal

7.1 The paperwork that the Appraiser and employee will need to prepare for the appraisal meeting is:-

- The employee's job description and person specification
- The *Appraisal preparation form – support staff F324a*
- The *Appraisal preparation form – self-evaluation for Teaching Assistants F324i* (if appropriate)
- The *Appraisal preparation form – self-evaluation for Higher Level Teaching Assistants F324h* (if appropriate)
- The previous year's appraisal form
- A new appraisal form for the coming appraisal year – *Appraisal Form – support staff F324*
- The school's improvement and development plan and/or any other relevant documents that identify priorities relevant to the employee's role

7.2 Both Appraiser and employee should prepare in advance and:

- review outcomes/objectives set at the last appraisal and progress made
- seek feedback (internal and external)
- recognise and celebrate successes and strengths
- consider what behaviours or other factors contribute to, or get in the way of success in the role
- identify things that may not have gone so well and the key learning points
- consider opportunities for self-development and learning needs
- start to think about next year's outcomes and priorities

7.3 Employees should remember that appraisal is a discussion about their performance. For appraisal to be most effective, employees will need to prepare, by reflecting on and gathering evidence of their performance and taking an active part in discussions.

8. The initial meeting

8.1 Discussions at the first appraisal meeting of the cycle will include:

a) **completion of the previous year's appraisal form** reflecting the end of year review and recording the employee's performance rating (level 1-4).

b) **setting up a new appraisal form for the coming year**, recording objectives and learning and development priorities.

8.2 In addition to any relevant evidence gathered by the Appraiser, discussions should allow consideration of the employee's preparation for the appraisal including their view on performance against the previous year's objectives, thoughts on appropriate objectives for the coming year and any self-evaluation.

Note - Where an employee is being supported at the formal stage of the capability procedure, the decision may be taken by the Headteacher to withhold the next annual salary increment (where one would otherwise be payable). See Section 4 above.

9. Reviewing progress throughout the year

9.1 Mid-year appraisal review

This formal mid-year review should take place around six months after the initial meeting. Progress against appraisal objectives, performance in the role and learning and development needs should, however, be discussed throughout the year.

The mid-year review is an opportunity to formally reflect on how things are going, to review progress and priorities, set new ones (if appropriate) and discuss particular work issues and learning needs. Performance may be as much about attitude, personal style and approach to work as it is about achieving objectives, so this should also be discussed in the round – to reinforce positives and to address any concerns.

9.2 Observation

Where appropriate and practical, observation of work practice can be a useful performance tool both as a way of assessing employee performance to identify any particular strengths and areas for development the employee may have. If observation is applied as a tool for performance assessment it should be carried out in a supportive way by those with knowledge of the

employee's work and appropriate and timely verbal and/or written feedback should be given.

10. The performance rating scale

10.1 The appraisal scheme will provide a written record of the overall performance of the employee. Formal performance ratings are given at the end of a review period, and it is especially important that they are accurate and consistently applied, especially if a decision is taken to withhold increments for low ratings. The rating awarded at annual appraisal discussions, in most cases, will reflect the whole years discussion and feedback.

Note - There should be no surprises at appraisal – where there are concerns about performance, these will have been highlighted during the year and appropriate actions already put in place. In cases of significant or ongoing concern, such action may include support under this appraisal scheme or instigating the schools' capability procedure.

10.2 Where an employee is new to a role or is undergoing training, due consideration should be given when a rating is applied (this should also happen when setting goals at the start of the review period).

10.3 There are five ratings (see Appendix 2 for details of how to achieve these ratings):

- Level 4: Exceeding the requirements of the job.
- Level 3b: Achieving the requirements of the job – good consistent performance and adding value.
- Level 3a: Fully achieving the requirements of the job – satisfactory performance.
- Level 2: Achieving some requirements of the job but improvement required.
- Level 1: Not meeting job requirements.

There should be a clear link with the capability procedure where a Level 1 grade is being considered.

10.4 If the Appraiser and employee cannot agree on a performance rating, the meeting should be adjourned for a few days to allow both parties time to reflect. This may be all that is required for agreement to be reached. If an impasse remains, all differences need to be documented and communicated to the Reviewing Officer for review and resolution. The Reviewing Officer will review the issues raised and determine whether the whole process has been applied in accordance with the principles underpinning the scheme. No further appeal beyond the review by the Reviewing Officer is available. It is everyone's responsibility to seek mutual understanding and agreement.

11. Poor performance – addressing issues

11.1 Where performance is likely to be assessed at Level 1 or 2, or the employee's performance has dipped noticeably, it is particularly important that this is discussed over the course of the year.

11.2 Before considering applying the formal capability process, it will be appropriate to consider taking action in the form of an informal discussion. This will help to determine if there is a problem and what it is. Once the facts are gathered and the seriousness of the problem established, there are three initial options:

- drop the matter (no case to answer or trivial problem)
- arrange structured, informal support – counselling (see Appendix 3 for the process and guidance)
- commence the capability procedure and arrange a formal capability interview where there is insufficient acceptance of the problems or the problems are already serious.

Strategy consideration - Model *Capability model procedure - support staff P329c* is available on InfoSpace.

11.3 Any employee not fully meeting the requirements of the job should be advised of any improvements or developments needed to give them best opportunity to achieve a Level 3a (or higher) assessment in future.

12. Differentiating performance

12.1 Principles

This section guides the Appraiser in differentiating performance – i.e. assessing how well someone achieves the requirements of the job, which are defined by the employee's job description, and the objectives/outcomes agreed with the employee at their last appraisal (and reviewed with them during the year).

Performance focuses on the end results, agreed outcomes and the job specific behaviours the employee needs to display in order to carry out their role.

Essentially, the Appraiser is rating performance against the stated goals and outcomes and activities the employee has been required to undertake.

The Appraiser should use the full range of the rating categories as appropriate, so they make the process meaningful and credible for employees. The more specific and evidence-based the assessment, the more confident the Appraiser will feel about it, and the easier it will be to handle questions and challenges about judgements made.

If the Appraiser finds it difficult to make an assessment of an employee, the section below may prove useful.

12.2 Guidelines

Appendix 2 shows examples of how an Appraiser might distinguish the different categories of a person employee's performance. The examples are intended to aid judgments, which the Appraiser should make in line with the principles above. They are generic examples and the Appraiser will need to translate them into the working world of the employee.

Appraisers should ensure that any appraisal ratings are determined in an equitable manner, in accordance with the principles outlined above. However, there will be situations where it is not possible to assess an employee either against the full requirements of the job, or for the full twelve-month period, e.g. new starters, periods of long-term absence and employees with a disability. Further guidance on how to approach such situations is set out in Appendix 4.

13. Data Protection

Personal data collected and processed for the purpose of the policy and procedure will be handled in accordance with the data protection policy and applicable statutory obligations. Any personal data collected is held securely and accessed by, and disclosed to, individuals only for the purposes of employee management or to comply with statutory reporting obligations. Inappropriate access to, or disclosure of, employee data constitutes a data breach and should be reported without delay, in accordance with the data protection policy. It may also constitute a disciplinary offence in which case it would be dealt with under the disciplinary policy and procedure.

Appendix 1 – Roles and responsibilities

Appraiser's Role
Prepare effectively and in good time for the appraisal meeting. Seek evidence from different sources regarding the employee's performance and strengths.
Prepare clear objectives to agree with the employee and have a clear framework and criteria for appraising the employee which is consistent across all employees that are being appraised.
Seek development opportunities to enhance personal skills as an Appraiser for delivering an effective appraisal if required.
Encourage the employee to view the appraisal as a two-way process and facilitate the meeting in a way that enables full participation from the employee.
Provide helpful, constructive and evidence-based feedback to the employee.
Acknowledge and celebrate achievements and strengths.
Address any areas where performance is not meeting the required standard and provide support to help the employee to develop/improve skills. Identification of these should not come as a surprise to the employee at the appraisal meeting.
Agree clear outcomes with the employee that fit with the school's goals and objectives.
Offer learning and development opportunities that support the employee to achieve their objectives and that suit their learning style. Consider work allocation, mentoring or coaching as well as 'courses' to help employees to develop.
Proactively seek feedback from the employee on the process, including the Appraiser's own management approach and style.
Manage the administration and paperwork efficiently. This should include storing appraisal records and recording employee's appraisal scores in a central but confidential place.

Employee's Role
Prepare effectively and in good time for the appraisal meeting – see *Appraisal preparation form – support staff F324a, Appraisal preparation form – self-evaluation for Teaching Assistants F324i and Higher Level Teaching Assistants F324h* (if appropriate).

Be open to receiving feedback on performance or behaviours and take this constructively. Do not take offence but be prepared to listen.
Use the appraisal for honest and constructive self-assessment and to engage with feedback.
Acknowledge and celebrate achievements and strengths.
Address any areas of poor performance and identify how skills can be developed/improved.
Participate in objective setting and report back on progress during the year.
Think creatively about how knowledge/skills could be increased and how these could be shared with colleagues.
Provide helpful and constructive feedback to the Appraiser on their management style.
Complete paperwork in a timely manner.

Reviewing Officer's Role
Take an overview of all appraisals in the school or area of the school.
As appropriate, and prior to the appraisals, discuss with Appraisers any particularly high or low ratings that are anticipated in their proposed performance assessments so any likely issues can be considered.
Read and sign off each individual employee's appraisal form.
Check for consistency and a coherent set of SMART outcomes that support the school's goals and aims.
Monitor the quality of the appraisal in general.
Ensure equity and fairness – e.g. look at and 'sense check' the distribution of ratings across whole teams once appraisals are completed.
Give comments and feedback to Appraisers and share good practice.
Complete paperwork in a timely manner – remember that a lot of effort will have gone into the appraisal from the Appraiser and employee, so ensure to complete the process by adding comments, signing and returning paperwork as soon as possible.
Follow the process agreed regarding submission of completed forms.
In situations where an increment is to be withheld, that appropriate notification is sent to the HR/Payroll provider.

Appendix 2 – Differentiating performance guidelines

How to use this table: The table below provides generic examples to help distinguish between the different performance levels of individuals and the allocation of a performance rating. It is not designed to be used as a 'tick box'. Use it as a set of prompts to aid judgment in assessing performance in the job, including specific goals or objectives. The examples are broad and will need to be translated into the working context of employees. Use all the ratings as appropriate. **NB.** the options at Level 3 are to enable differentiation between 'satisfactory' and 'good' performance.

1 Not meeting job requirements - significant improvement in performance needed	**2 Achieving some requirements of job but improvement needed - inconsistent performance**	**3a Achieving the requirements of the job - satisfactory performance**	**3b Achieving the requirements of the job - good consistent performance (and adding value)**	**4 Exceeding the requirements/expectations of the job - outstanding performance**
Has performance issues in most or significant aspects of the role	Performs some aspects of the role to an acceptable standard but needs to improve in *some job-critical aspects*	Performs all aspects of the core job consistently and to an acceptable standard – however that is defined	Can do all in the Level 3a box and regularly/often to a high standard – consistently high quality of work	Can do all in Level 3b column, **and** think about implications at the next level and make adjustments, plans or recommendations accordingly
Meets none or very few of the outcomes/objectives agreed although appropriate resources and support available	Meets some objectives/outcomes. Does not achieve some objectives. Where objectives/goals are not met, is mostly as a result of individual	Meets core objectives and does everything expected and in the required way. Where objectives/goals are not met, these are the exception and are as a result of external	Does all in the Level 3a box and frequently makes extra efforts to do everything they are expected to do.	Goes beyond Level 3b and does additional things that haven't been asked for which move the organisation or the department/service forward, breaking new ground. OR

	performance rather than other factors.	factors rather than individual performance		Makes an exceptional or unique contribution in support of team, service or objectives
Focuses more on difficulties and problems, sometimes makes excuses	Focuses on delivering only certain things. Loses sight of some objectives.	Focuses on delivering what has been agreed to a good level	Focuses on delivering what has been agreed to the best possible level	Delivers more than has been agreed – exceeds expectations. Proactive - thinks ahead and uses initiative to address issues and drive things forward before being asked
1 Not meeting job requirements - significant improvement in performance needed	**2 Achieving some requirements of job but improvement needed - inconsistent performance**	**3a Achieving the requirements of the job - satisfactory performance**	**3b Achieving the requirements of the job - good consistent performance (and adding value)**	**4 Exceeding the requirements/expectations of the job - outstanding performance**
Tends to deliver work late, over budget or to an unsatisfactory level	Delivers some work to time, budget or manager's satisfaction but inconsistently	Delivers to time, budget and generally to manager's satisfaction	Meets and sometimes exceeds expectations by faster response or earlier delivery than expected	Goes beyond Level 3 by consistently going the extra mile and often suggesting/initiating improvements to quality of delivery
Tends to stop at obstacles	Does not always follow things through	Follows key requirements through as needed	Consistently follows things through to a high standard	Consistently makes extra efforts to follow things through despite setbacks or problems, and makes extra efforts

				to overcome the setbacks and problems
Tends not to consider the wider context	Does some of what has been asked but can miss the wider context	Does what has been asked	Does fully what has been asked and considers the wider organisation and/or team as well	Takes the initiative, takes on improvement projects in the broader interest of the department or the whole organisation/service/team.
Behaviours for role not demonstrated to required level – gaps and concerns identified	Required behaviours not necessarily consistently demonstrated	Displays most key behaviours expected for the post/level and how job is achieved	Does all in the Level 3a box and frequently 'goes the extra mile' to behave or achieve in the ways expected.	Displays consistently excellent performance around key behaviours and how job is achieved – seen as a role model
Requires more supervision than the role should need	At times needs a high level of supervision where should be able to work unsupervised	Able to work largely unsupervised (as appropriate to the role) in all except the most complex tasks or those outside usual scope of job	Does all in the Level 3a box and is able and willing to take on new or more complex tasks with minimal supervision (as appropriate to the role)	Is proactive in taking on new or more complex tasks with minimal supervision (as appropriate to the role); is seen as expert or leader in their work
Shows little interest in own development and learning or updating knowledge or skills	Shows some commitment to own development and improvement	Attends learning and development as agreed	As in Level 3a box, and reviews own knowledge and skills and seeks own development opportunities.	Shows ongoing commitment to own learning, professional and personal development, proactive in keeping up to date

			Good level of self-awareness	with new skills, and shares these. Excellent level of self-awareness

Notes

In any cases of potential Level 1 and Level 2 ratings, managers must address performance issues well in advance of the appraisal:

- managers will have been having regular and ongoing discussions which talked clearly about the performance issues, gaps, development support, and an improvement plan is in place
- this would be evidenced.
- there will have been explicit conversations – well in advance of the appraisal which indicated (and then potentially confirmed or not, if there was improvement) that an increment would not be awarded.

Not able to rate

If an employee has been absent from work for a significant part of the year, or is new in role, reference should be made to Appendix 4, Performance rating in specific situations.

Appendix 3 – Informal support: Counselling

Counselling refers to a period of discussion and support with an employee to assist them in bringing about improvement where concerns about performance have been established. Counselling should aim to encourage and help the employee improve. It should be conducted discreetly. Consideration should be given to any professional, personal or domestic difficulty which could be hindering the employee's performance. Explanations should be considered carefully and the matter dropped if it becomes evident that there is no case to answer. The employee must be told what is required, how performance will be reviewed, the review period, and that the formal capability procedure will commence if there is no improvement. The identified areas for improvement, targets, agreed support and monitoring should be written into the *Personal action plan F329*. It is desirable that the Headteacher or line manager and employee both sign the action plan.

Counselling should not go on too long. There are no hard and fast rules about timescales at the counselling stage and the length of time deemed appropriate by the Headteacher may be influenced by a number of factors. It will, however, be important to ensure that lengthy periods without improvement are avoided. It should allow sufficient time for less serious problems to be resolved but, if it is not effective in bringing about required improvement in a relatively short timeframe, the formal procedure should be used.

A written note of any counselling under this procedure should be kept for reference.

Discussion must not harass the employee or turn into a formal interview. If more serious concerns arise, or if the employee expresses discontent or indifference to the counselling/informal coaching, this should be discussed with the employee before an appropriate next step is determined. Helping the employee understand the situation they are in, particularly by sharing evidence and clarifying the extent of the gap between their current performance and where they need to be, can ensure co-operation on their part. If the employee's discontent displays itself through a lack of willingness to co-operate with the process, or if more serious concerns indeed arise during the counselling stage, the formal capability procedure can be commenced to deal with the matter in a more structured way.

After a period of review involving observation and assessment, a firm conclusion should be reached. The options will be either to:

- drop the matter; or
- continue under the counselling stage if good progress has been made under the counselling stage but not quite to the required level (i.e. where the Headteacher is confident that with a little more support the problems can be overcome in a short timescale); or
- convene a formal capability interview under the capability procedure.

Appendix 4 – Performance rating in specific situations

Appraisal goals/priorities changed during the year

There may be circumstances where factors outside the employee's control mean it was not possible for them to achieve some objectives, e.g. a project or piece of work is not progressed further or there has been a change in work priorities or objectives. In such circumstances, Appraisers should exercise appropriate judgment and assess performance against the other work tasks and activities carried out.

Adjusted/limited appraisal goals

There may be circumstances in which someone is given limited goals – e.g. a new starter will have fewer initial objectives – and the performance assessment will take this into account. The Appraiser will be assessing performance against that limited set of objectives, if that is what has been agreed for a legitimate reason. Similarly, if employee's job has been adjusted for any reason, for example as a reasonable adjustment on the grounds of disability, the employee should then be assessed only against what they have been given to do.

New employees

New employees may be given limited goals and have fewer initial objectives – the performance assessment should take this into account.

Appraisers should assess performance against the job role as delegated to the employee up to that point in time, rather than against the full job description if they have not been asked to undertake the full role e.g. during induction or probationary period.

It is expected that where the employee is a new entrant to the school and subject to a probationary period, any performance issues should be highlighted and addressed through the *Probation model policy P113* and *procedure P113a* in the same way that the *Capability model procedure - support staff P29c* will be applied for any employee who is not subject to a probationary period.

Employees who do not have six months' employment in their post on 1st July (i.e. since their appointment or promotion/regrading) will not be eligible for their first increment until six months after their appointment or promotion/regrading (in accordance with the MRS Agreement).

Periods of long-term absence

Employees may be absent for a significant period during the appraisal assessment period for a number of reasons e.g. maternity, adoption, shared parental leave or

surrogacy leave, long-term sickness absence, periods of unpaid leave, secondment to another school. It may be that the employee has recently returned to work or they are currently absent but were at work at some point during the performance appraisal year. In such circumstances, the approach should mirror that for new employees above i.e. the employee should be assessed on the basis of an agreed range of fewer objectives and limited goals appropriate to the period of time they have been present at work.
Where the employee has been absent for the whole appraisal year for any reason, they will have their performance assessment based on the previous year's outcome.

Employees with a disability

It is not appropriate to discuss reasonable adjustments within the appraisal meeting – this should be dealt with separately. Where reasonable adjustments have been identified but not implemented in the workplace and this has impacted detrimentally on the employee's performance, the overall assessment rating needs to be adjusted to take account of this.
Similarly, if the employee's job has been adjusted for any reason, for example as a reasonable adjustment on the grounds of disability, their performance should be assessed against the adjusted job.

In all cases, Appraisers should ensure that they have a clear, documented evidence base to support the performance assessment reached during the appraisal.

Temporary staff

For staff who are on temporary/fixed term contracts for medium to long periods, the expectation is that an appraisal should be completed.

Agency workers

Whilst an appraisal should not be carried out for agency workers, in order to support their development, it would be appropriate to have a discussion with them about their performance in the role they are covering where they have been on assignment with the school for some time, and this is continuing.

Further advice on any other aspects relating to agency staff can be obtained from the HR provider.

Appendix 5 – Table of changes

Date of change	Paragraphs affected	Summary of update
28/11/2023	All	Review of whole document and terminology to ensure consistency across all policies and procedures. Removal of reference to Multi-academy Trusts as separate document created (P324c).
27/09/2023	All	Review of whole document and change in terminology from "performance appraisal" to "appraisal".
24/11/2022	2	Updated listed protected characteristics in line with section 4 of the Equality Act 2010
17/11/2021	1	Additional paragraph to include consideration for employees with mental health issues.
27/11/2018		Updated to ensure the policy is fit for MAT's. Main changes are to terminology and academy structure/set up.
11/05/2018	9	New para added to take account of the General data protection regulations in force from 25 May 2018.
24/08/2017	All	Merge of Appraisal model policy and Appraisal guidance – support staff to create an overall policy and procedure which adds the informal stage of the capability procedure to the appraisal process, adds the option for academies to withhold increments based on performance and updates the appraisal rating scale to include a new rating (3a and 3b)
01/03/2017	All	New formatting due to launch of new HR website, HR InfoSpace – no change to content