



**The Robert Carre Trust**

## **Appraisal - Support Staff - Policy**

### **Purpose**

This policy sets out the framework for a clear and consistent assessment of the overall performance of all members of the Trust's support staff and for supporting their development within the context of the Trust's plan for improving educational provision and performance. It also sets out the arrangements that will apply when staff fall below the levels of competence that are expected of them. Appraisal in this Trust will be a supportive and developmental process designed to ensure that all support staff have the skills and support they need to carry out their role effectively. It will help to ensure that staff are able to continue to improve their professional practice and to develop. Appraisal will be used to help inform pay progression decisions.

### **Application of the policy**

The policy applies to all members of support staff employed by the Trust, except those on contracts of less than one term, and those who are subject to the Trust's Capability Policy.

### **The appraisal period**

The appraisal period will run for twelve months from 1 September to 31 August.

The annual audit/assessment for support staff will be completed no later than 31 October. Support staff 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 period will be determined by the duration of their contract.

### **Appointment of Appraisers**

The Headteacher/Head of School will decide who will appraise members of support staff. In this Trust, this will normally be:

- The Headteacher/ Head of School;
- A member of the Senior Team;
- A member of support staff with a clear line management overview of the appraisee's work;
- A member of the teaching staff with a clear line management overview of the appraisee's work.

For the Director of Finance, Administration and Resources, the appraisal will be conducted by the PM Panel comprising two Trustees (excluding the Chair) and the Executive Headteacher, with appeal to the Chair of Trustees.

### **Setting Objectives**

Objectives for each member of support staff will be set before, or as soon as practicable after, the start of each appraisal period. The objectives set for each individual will take account of the following:

- relevant occupational standards;
- the individual's job description;

- the person specification relating to the individual's role.

The objectives set will be Specific, Measurable, Achievable, Realistic and Time-bound and will be appropriate to the individual's role and level of experience. The appraiser and appraisee will seek to agree the objectives but, if that is not possible, the appraiser will determine the objectives, and the appraisee may record their comments in writing as an appendix to the appraisal statement. Objectives may be revised if circumstances change.

The objectives set for each member of staff, will, if achieved, contribute to the school's plans for improving the Trust's educational provision and performance and improving the education of students at each school.

Under normal circumstances staff will have a maximum of 3 objectives. However, staff who are found not to be meeting standards at an acceptable or appropriate level for their career as indicated by the annual ratings audit may be given as many additional objectives as are required to ensure that the most appropriate support can be provided.

### **The annual assessment process**

Staff should complete a self-audit with reference to relevant occupational standards, job descriptions, and person specifications. Each member of staff's appraiser should complete the audit in exactly the same way. 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.

Appraisee and appraiser should meet with the aim to set objectives for the coming year and to determine any professional development requirements. The objectives decided at, or following, the meeting will form the basis of the annual appraisal statement. The appraisee should complete their section of the appraisal review form prior to the appraisal meeting taking place and share it with the appraiser in advance of the meeting

### **Pay progression**

Where staff are eligible for pay progression, the recommendation made by the appraiser will be based on the assessment of their performance against the agreed objectives. The decision made by the relevant decision-making body will be based on the statutory criteria and the relevant professional standards. Staff may request, as part of their annual appraisal meeting, to be considered for accelerated pay progression either within their pay band or to the next pay band at the end of the review cycle. This will be subject to review of performance, and evaluation of the role, and may require additional or more challenging objectives to be set for the appraisal period and will be agreed at the start of the annual appraisal cycle.

### **Reviewing Performance**

#### **Observation**

This Trust believes that observation of work practice is important both as a way of assessing staff performance in order to identify any particular strengths and areas for development they may have, and of gaining useful information which can inform Trust improvement more generally. All observation will be carried out in a supportive fashion by those with knowledge of the appraisee's work and appropriate and timely oral and/or written feedback will be given.

#### **Development and support**

Appraisal is a supportive process which will be used to inform continuing professional development. The Trust wishes to encourage a culture in which all staff take responsibility for improving their skills through appropriate professional development. Professional

development will be linked to each school's improvement priorities and to the on-going professional development needs and priorities of individual staff.

## **Feedback**

Staff 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 will include discussion with the member of staff, will highlight particular areas of strength as well as any areas that need attention and will determine any appropriate action required.

When progress is reviewed, if the appraiser is satisfied that the appraisee 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.

## **Transition to capability**

If the appraiser is not satisfied with progress, the appraisee will be notified in writing that the appraisal system will no longer apply and that their performance will be managed under the Trust's Capability Procedure. This will trigger the commencement of the formal Capability Procedure.

## **Annual Assessment**

Each individual's performance will be formally assessed in respect of each appraisal period.

This assessment is the end point of the annual appraisal process, but performance and development priorities will be reviewed and addressed on a regular basis throughout the year by means of:

- Task observations;
- Termly meeting with appraiser;
- Mid-cycle review meeting with appraiser;
- Observation / scrutiny of leadership and management activities where appropriate;
- Other feedback obtained during the cycle relevant to the appraisee's overall performance.

As soon as practicable following the end of each appraisal period, the appraisee will contribute to, receive, and have the opportunity to comment in writing on, a written appraisal report. In the Trust school, members of support staff will receive their written appraisal reports no later than 31 October. The appraisal report will include:

- the appraisee's own review of their performance
- details of the appraisee's objectives for the appraisal period in question;
- an assessment of the appraisee's performance of their role and responsibilities against their objectives, relevant standards, job description and person specification;
- an assessment of the appraisee's training and development needs and identification of any action that should be taken to address them;
- a recommendation on pay progression where that is relevant and in keeping with Terms and Conditions of Employment for school support staff.

The assessment of performance and of training and development needs will inform the planning process for the following appraisal period.

Any recommendations on pay will be referred to the Headteacher/Head of School and the Executive Headteacher before being referred on to the Pay Committee of the Trust

### **Staff Experiencing Difficulty**

When dealing with an individual experiencing difficulties, the objective is to provide support and guidance through the Appraisal process in such a way that the individual's performance improves and the problem is, therefore, resolved.

Where it is apparent that an individual's personal circumstances are leading to difficulties in the Trust, support will be offered as soon as possible, without waiting for the formal annual assessment.

If an appraiser identifies through the appraisal process, or via other sources of information, for example, parental complaints, that the difficulties experienced by an individual are such that, if not rectified, could lead to capability procedures, the Appraiser, the Headteacher, or a member of the Leadership Team, will, as part of the Appraisal process meet the individual to:

- Give clear written feedback to the individual about the nature and seriousness of the concerns;
- Give the individual the opportunity to comment on and discuss the concerns;
- Give the individual at least 5 working days' notice that a meeting will be held to discuss targets for improvement alongside a programme of support;
- In consultation with the individual at the above meeting, an Action Plan with support will be established (for example coaching, training, in-house support, mentoring, visits to other schools or discussions with external advisers), that will help address those specific concerns;
- Make clear how progress will be monitored and when it will be reviewed;
- Explain the implications and process if no - or insufficient - improvement is made

The individual's progress will continue to be monitored as part of the Appraisal process and a reasonable time given for the individual's performance to improve. This will depend upon the circumstances but will be for a period of three weeks, with appropriate support as agreed in the Action Plan, in order that the aim of recovering and improving performance can be achieved. During this monitoring period the individual will be given regular feedback on progress and arrangements will be made to modify the support programme if appropriate.

If sufficient progress is made such that the individual is performing at a level that indicates there is no longer a possibility of capability procedures being invoked the individual should be informed of this at a formal meeting with the Appraiser or Headteacher/Head of School. Following this meeting the Appraisal process will continue as normal.

If no, or insufficient, improvement has been made over this period, the individual will be invited to a Transition Meeting to determine whether formal capability proceedings need to be commenced or the Appraisal process remains in place. The individual may be assisted by a Trade Union representative or work colleague and will have at least 5 working days' notice of the meeting.

### **Appeals**

Appraisees have a right of appeal against any of the entries in the written appraisal report. In the first instance, this should be put in writing to the Headteacher/Head of School. Where the line manager is the Headteacher/Head of School, this should be put in writing to the Chair of the Local Governing Body. Where the line manager is the Executive Headteacher, this should be put in writing to the Chair of the Trust. Staff who work across the Trust should put any appeal in writing to the Executive Headteacher; Appeals by the Director of Finance, Administration and Resources should be made in writing to the Chair of the Trust.

### **General principles underlying this policy**

### **ACAS Code Of Practice on Disciplinary and Grievance Procedures**

The conduct of the formal capability stage will be undertaken in accordance with the provisions of the ACAS Code of Practice.

### **Consistency of Treatment and Fairness**

The Robert Carre Trust is committed to ensuring consistency of treatment and fairness and will abide by all relevant equality legislation.

### **Retention and data protection**

The Governing Body and Executive Headteacher will ensure that all written appraisal records are retained in a secure place. As part of the application of this policy, the Trust may collect, process and store personal data in accordance with our data protection policy. We will comply with the requirements of **Data Protection Legislation** (being (i) unless and until the GDPR is no longer directly applicable in the UK, the General Data Protection Regulation ((EU) 2016/679) and any national implementing laws, regulations and secondary legislation, as amended or updated from time to time, in the UK and then (ii) any successor legislation to the GDPR or the Data Protection Act 1998). Records will be kept in accordance with our Staff Privacy Notice, our Records Management Policy and in line with the requirements of Data Protection Legislation

### **Associated Policies**

- Staff Code of Conduct
- Pay Policy
- Teacher Appraisal Policy

**Updated and ratified at the meeting of the Board on 26 November 2018**

**Next Review Date: November 2022 (4 years)**

### **Appendices**

- 1 – RCT Appraisal Review Form – Support Staff
- 2 – RCT Appraisal Objective Setting Form – Teaching and Support Staff
- 3 – Sample Review Form
- 4 – Sample Objective Setting Form
- 6- Guidance

### **Websites to support specific roles:**

[www.coversupervisors.co.uk](http://www.coversupervisors.co.uk)

[www.thecaretakers.net](http://www.thecaretakers.net)

[www.data.org.uk](http://www.data.org.uk) D & T Technicians

[www.examofficers.org.uk](http://www.examofficers.org.uk)

[www.napta.org.uk](http://www.napta.org.uk) TAs & HLTAs

[www.ncsl.org.uk](http://www.ncsl.org.uk) info re CSBM, DSBM and competency framework for Business Managers and administrators.



Name (Appraisee) <a href="#">Click here to enter text.</a>		Name (Appraiser) <a href="#">Click here to enter text.</a>	
Role: <a href="#">Click here to enter text.</a>		Date of appraisal meeting <a href="#">Click here to enter a date.</a>	
<p>This form should be used by the appraiser to document particular areas of strength or success and areas for development. Where there are development needs this should form part of the objective setting discussion for the year ahead and be incorporated into the objectives, evidence/success criteria, training and support agreed. It is suggested that this form is used year on year (rather than starting a new one each year) unless an individual's job changes significantly.</p>			
Objective to review (Appraisee enters each objective set last year below)	Areas of particular strength /success this year	Areas for development or consideration	Training/Support required or Coaching focus
<a href="#">Click here to enter Objective 1</a>	<a href="#">Click here to enter text (appraisee).</a> <a href="#">Click here to add further comment (appraiser)</a>	<a href="#">Click here to enter text (appraisee).</a> <a href="#">Click here to add further comment (appraiser)</a>	<a href="#">Click here to enter text (appraisee).</a> <a href="#">Click here to add Further comment (appraiser)</a>
<a href="#">Click here to enter Objective 2</a>	<a href="#">Click here to enter text (appraisee).</a> <a href="#">Click here to add further comment (appraiser)</a>	<a href="#">Click here to enter text (appraisee).</a> <a href="#">Click here to add further comment (appraiser)</a>	<a href="#">Click here to enter text (appraisee).</a> <a href="#">Click here to add further comment (appraiser)</a>
<a href="#">Click here to enter Objective 3</a>	<a href="#">Click here to enter text (appraisee).</a> <a href="#">Click here to add further comment (appraiser)</a>	<a href="#">Click here to enter text (appraisee).</a> <a href="#">Click here to add further comment (appraiser)</a>	<a href="#">Click here to enter text (appraisee).</a> <a href="#">Click here to add further comment (appraiser)</a>
<a href="#">Click here to enter Optional Objective.</a>	<a href="#">Click here to enter text (appraisee).</a> <a href="#">Click here to add further comment (appraiser)</a>	<a href="#">Click here to enter text (appraisee).</a> <a href="#">Click here to add further comment (appraiser)</a>	<a href="#">Click here to enter text (appraisee).</a> <a href="#">Click here to add further comment (appraiser)</a>
Pay recommendation (To be completed by appraiser)	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>		
Appraiser	<a href="#">Click here to enter signature.</a>	<a href="#">Click here to enter a date.</a>	
Appraisee	<a href="#">Click here to enter signature.</a>	<a href="#">Click here to enter a date.</a>	



Name (Appraisee) <a href="#">Click here to enter text.</a>	Name (Appraiser) <a href="#">Click here to enter text.</a>
--	--

Role: <a href="#">Click here to enter text.</a>	Date of appraisal <a href="#">Click here to enter a date.</a>
---	---

Whole School Improvement Plan Priorities	<ol style="list-style-type: none"> <li>1. Create the conditions for staff and students to thrive</li> <li>2. Focus on improving the impact of teaching through focused research and coaching</li> <li>3. Use data intelligently to support teaching and student progress</li> <li>4. Ensure high standards of wellbeing, behaviour and effective safeguarding</li> <li>5. Embed and sustain improvements in Sixth Form student outcomes and experience</li> </ol>
--	---

My Personal Professional Development Priorities (in line with the Teacher Standards for teaching staff only) based on my annual review are:	<p>Insert your priorities below in anticipation of/based on the outcomes of your review discussion:</p> <ol style="list-style-type: none"> <li>1. <a href="#">Click here to enter text.</a></li> </ol>
---	--

Objective (What do you hope to develop/achieve?)	Actions required: <small>(What key steps will you take to meet the objective?)</small>	Success criteria <small>(What evidence will suggest you have been successful? Obj 1 should specifically refer to some pupil outcome data for teaching staff )</small>	Timeframe <small>(When will you take the actions stated?)</small>	Support required <small>(What help will you need? From who?)</small>	The Whole School Priority this meets most is.... <small>(choose from menu below)</small>
Objective 1 <a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	Choose an item.
Objective 2 <a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	Choose an item.
Objective 3 <a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	Choose an item.
Objective 4 (Optional) <a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	<a href="#">Click here to enter text.</a>	Choose an item.

The [Teacher Standards](#) can be found here for reference (Teaching Staff Only)

Agreed/Additions made (delete as appropriate) by Appraiser	Signature.	<a href="#">Click here to enter a date.</a>
Agreed by Appraisee	Signature	<a href="#">Click here to enter a date.</a>



Sample Completed RCT Support Staff Appraisal Review Form Academic Year 2017-18 .....APPENDIX 3

<b>Name (Appraisee): A. N. Other</b>		<b>Name (Appraiser): J. Bloggs</b>	
<b>Role: Administrative Assistant</b>		<b>Date of appraisal meeting: 05/10/2018</b>	
<p>This form should be used by the appraiser to document particular areas of strength or success and areas for development. Where there are development needs this should form part of the objective setting discussion for the year ahead and be incorporated into the objectives, evidence/success criteria, training and support agreed. It is suggested that this form is used year on year (rather than starting a new one each year) unless an individual's job changes significantly. A copy of the teaching standards can be obtained <a href="#">here</a></p>			
<b>Objective to review (Appraisee enters each objective set below)</b>	<b>Areas of particular strength /success this year</b>	<b>Areas for development or consideration</b>	<b>Training/Support required or Coaching focus</b>
<b>Implement use of new school communication App for parent and staff communication</b>	<p>All letters and forms for parental completion now issued via new communication App reducing time for chasing letters by office staff</p> <p>Anecdotal parental feedback has been mixed on its effectiveness</p> <p><a href="#">Click here to add further comment (appraiser)</a></p>	<p>More to do to ensure 100% sign up by parents and that parents receive trouble shooting assistance when necessary</p> <p><a href="#">Click here to add further comment (appraiser)</a></p>	<p>Further software training provided by either provider or via online helpdesk</p> <p><a href="#">Click here to add Further comment (appraiser)</a></p>
<b>Improve speed and accuracy of attendance monitoring of Sixth Form</b>	<p>Working across the SJSF has produced challenges but systems now put in place to enable swifter communication between sites. Attendance monitoring improved but still needs further consideration</p> <p><a href="#">Click here to add further comment (appraiser)</a></p>	<p>The team would welcome a more sophisticated/IT based sign in system that encourages Sixth Formers to sign in at sites more reliably until then I will endeavour to aim to get all A.M. attendance up to date each day by 10am.</p> <p><a href="#">Click here to add further comment (appraiser)</a></p>	<p>Suggestions to be made to Operations Manager for the RCT and collaborative plan formed</p> <p><a href="#">Click here to add Further comment (appraiser)</a></p>
<b>Oversee administration for Junior Prize Giving</b>	<p>JPG went really smoothly this year. Some minor tweaks needed for next year</p> <p><a href="#">Click here to add further comment (appraiser)</a></p>	<p>Meet with Assistant Head i/c JPG in September to record suggested improvements for July 2019. Suggested changes to be made to ordering systems and ticketing for parents to reduce overcrowding at the Church.</p> <p><a href="#">Click here to add further comment (appraiser)</a></p>	<p>Work with Assistant Head to review changes for 2019</p> <p><a href="#">Click here to add Further comment (appraiser)</a></p>



<b>Pay recommendation</b> (To be completed by appraiser)	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input checked="" type="checkbox"/>		
<b>Appraiser</b>	<b>J. Bloggs</b>	<b>10/10/2018</b>	
<b>Appraisee</b>	<b>A.N. Other</b>	<b>11/10/2018</b>	



Name (Appraisee) <b>A.N. Other</b>		Name (Appraiser) <b>J. Bloggs</b>			
Role: <b>Team leader: School Administration</b>		Date of appraisal meeting		<b>05/10/2018</b>	
Whole School Improvement Plan Priorities		<ol style="list-style-type: none"> <li>6. Create the conditions for staff and students to thrive</li> <li>7. Focus on improving the impact of teaching through focused research and coaching</li> <li>8. Use data intelligently to support teaching and student progress</li> <li>9. Ensure high standards of wellbeing, behaviour and effective safeguarding</li> <li>10. Embed and sustain improvements in Sixth Form student outcomes and experience</li> </ol>			
My Personal Professional Development Priorities based on my annual review are:		<p>Insert your priorities below in anticipation of/based on the outcomes of your review discussion:</p> <ol style="list-style-type: none"> <li>1. Improve delegation skills</li> <li>2. Avoid jobs bottlenecking in June/July by scheduling possible tasks earlier in the year where possible</li> <li>3. Improve Excel spreadsheet skills</li> </ol>			
Objective (What do you hope to develop/achieve?)	Actions required: (What key steps will you take to meet the objective?)	Success criteria (What evidence will suggest you have been successful?)	Timeframe (When will you take the actions stated?)	Support required (What help will you need? From who?)	The Whole School Priority this meets most is....  (choose from menu below)
Objective 1 Improve delegation skills	Consider which tasks can be delegated and to which members of the team. Use these development points to construct appraisal targets for team members.	<p>Empowerment of team.</p> <p>Succession planning in place.</p> <p>Workload across team more manageable.</p> <p>Team feels valued</p>	<p>Developments factored into appraisal targets (Oct)</p> <p>Training for new aspects of roles in place (Sept-Nov)</p> <p>Review of success of delegation of tasks reviewed (July)</p>	<p>Training on aspect a. from person X in via x</p> <p>October</p> <p>Training time built in to fortnightly team meetings</p>	Create the conditions for staff and students to thrive
Objective 2 Workload seem more manageable in hours allocated	<p>Create a gant chart of key role responsibilities throughout the academic year.</p> <p>Identity the weeks where work</p>	<p>Workload more manageable.</p> <p>Amount of Toil reduced</p>	<p>Gant chart created by end Sept.</p> <p>Revised schedule</p>	<p>Support from line manager esp. to consider which tasks can</p>	Ensure high standards of wellbeing, behaviour and effective

	<p><b>demands create bottlenecks.</b></p> <p><b>Identify tasks that can be tackled earlier of later in the year.</b></p> <p><b>Plan a revised schedule (using a gant chart or alternative schedule)that show tasks and deadlines. Link to delegation tasks above.</b></p> <p><b>Consider which tasks can be tackled more efficiently (new software, delegation of task, moved to a different team)</b></p>	<p><b>All holiday days taken</b></p> <p><b>Contracted hours worked</b></p>	<p><b>in place end Oct</b></p> <p><b>Review July</b></p>	<p><b>be reduced eliminated or delegate.</b></p>	<p><b>safeguarding</b></p>
<p><b>Objective 3</b></p> <p>Use excel to create more efficient method of managing tasks a,b and c</p>	<p><b>Spend 30 mins a week using 'Excel for Dummies' or other online tutorials to improve working knowledge of Excel.</b></p> <p><b>Consider which tasks can be more efficiently completed with this improved knowledge or through use of Excel</b></p>	<p><b>Working knowledge of Excel improves.</b></p> <p><b>Ways identified to put new knowledge to good use in regular admin tasks.</b></p>	<p><b>Select training source (book/online tutorial) and purchase</b></p> <p><b>Ongoing training (Oct-Feb)</b></p> <p><b>New system for data collection for (insert task) set up (Jan)</b></p> <p><b>In use by terms 5&amp;6</b></p>	<p><b>'Excel for Dummies' purchased or online training sourced</b></p>	<p><b>Use data intelligently to support teaching and student progress</b></p>
<p><b>Objective 4 (optional)</b></p>					
<p>The <a href="#">Teacher Standards</a> can be found here for reference (Teaching Staff Only)</p>					
<p>Agreed/Additions made (delete as appropriate) by Appraiser</p>	<p>J. Bloggs</p>		<p>10/10/2018.</p>		
<p>Agreed by Appraisee</p>	<p>A. N. Other</p>		<p>11/08/2018</p>		

**Performance Management Record Sheet – Interim Review Statement  
(Feb/March 2019)**

Name [Click here to enter text.](#)

Job Title [Click here to enter text.](#)

Reviewer [Click here to enter text.](#)  
[Click here to enter a date.](#)

Date of interim review discussion

Progress towards meeting Targets since September 1 <sup>st</sup> 2018			
Target	Objective	Evidence so far	Any Other Relevant comments.  Please record here (in the unusual event of the revision of a target) the revised target and reason for revision.
Objective 1:	Appraisee to paste objectives set here. <a href="#">Click here to enter text.</a>	Appraisee <a href="#">Click here to enter text.</a>	Appraiser to add additional detail if relevant.
Objective 2:	Appraisee to paste objectives set here. <a href="#">Click here to enter text</a>	Appraisee <a href="#">Click here to enter text.</a>	Appraiser to add additional detail if relevant.
Objective 3:	Appraisee to paste objectives set here. <a href="#">Click here to enter text.</a>	Appraisee <a href="#">Click here to enter text.</a>	Appraiser to add additional detail if relevant.
Optional	Appraisee to paste objectives set here. <a href="#">Click here to enter text.</a>	Appraisee <a href="#">Click here to enter text.</a>	Appraiser to add additional detail if relevant.

Any overall comments if relevant. (e.g. if it seems likely that targets will **not** to be met)

[Click here to enter text.](#)

Click here to enter text.

**Signed: Appraisee** [Click here to enter text.](#)

**Date:** [Click here to enter a date.](#)

**Signed: Appraiser** [Click here to enter text.](#)

**Date:** [Click here to enter a date.](#)

### Appraisee

The appraisee should complete both the review form and the target setting form **prior to arriving at the appraisal meeting** by inserting comments, evidence, ideas and suggestions into any blue text section. There is a sample review and target setting form saved in (e.g <T:\Administration - Staff\Appraisal\Performance Management Appraisal\Teaching Staff Appraisal\2018-19>) to help you if you need it. The form then needs saving in to your own appraisal documentation area on the school network (<T:\Administration - Staff\Appraisal\Staff>) and sending via email to your appraiser at least 2 working days prior to your appraisal meeting so they can prepare for the conversation with you.

After the appraisal meeting has been held and when your appraiser lets you know your documents are available for your consideration the appraisee should add their name and date to the bottom of the forms to indicate they are aware of, and happy with, the contents.

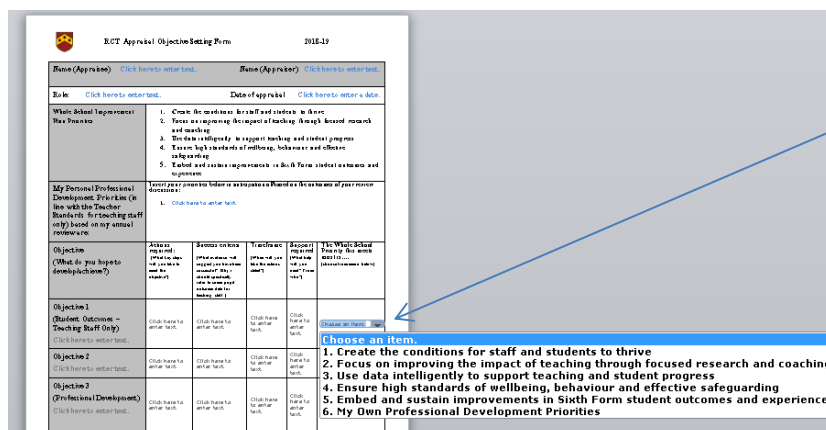
### Appraiser

The appraiser is expected to read the appraisee’s review of their previous year and their suggested targets for the forthcoming year prior to the appraisal meeting. **During or shortly after the appraisal meeting** conversation the appraiser should then complete any of the black sections on both the review and objective setting forms. The appraiser’s job is to add to the appraisee’s own comments. There may be other positive comments or expectations for development to add.

The appraiser should also comment on whether the appraisee has met the professional teacher standards (for appraisees who are teaching rather than support staff) simply by checking the relevant boxes.

If the appraisee is due for pay progression the **appraiser** (not the appraisee) should make it clear whether they recommend pay progression to the Headteacher.

The appraisee’s objectives should be set in line with the whole school priorities which can be found in the drop down menus on the objective setting template.



The appraiser should then save the documents into the **appraisee’s** appraisal documentation area (<T:\Administration - Staff\Appraisal\Staff>) and let the appraisee know they are there for final agreement.

Any questions do see the person responsible for overseeing the appraisal process in your school.