



Appraisal and Development for all Non-Teaching Staff Policy

Date: November 2015
Reviewed: September 2016
Reviewed: November 2018

Linked Policies

- Whole Academy Pay and Conditions Policy (October 2018)

Appraisal and Development for Support Staff Policy

1. Introduction

- 1.1 The Governors are committed to ensuring, through Appraisal and Development, that the skills and knowledge of all non-teaching support staff are commensurate with their job descriptions
- 1.2 Appraisal and Development means **constantly updating and reviewing knowledge skills and standards throughout working life.** This requires self-direction, self-management and responsiveness to all goals set and development opportunities offered
- 1.3 The Governors require all staff to participate in the process. It is recognised that the term 'support staff' covers a wide range of roles and functions and the principles applied in this document will need to be interpreted to suit the different demands in each reviewee's job description. The governors are committed to developing the quality of education that the school provides and recognise the benefits individuals gain from reflecting on their work, setting goals to achieve and taking part in training
- 1.4 There is a link between the Appraisal and Development process and performance related pay. There is no link with the disciplinary process
- 1.5 The purposes of the process are:
- To review performance and provide feedback by the appraiser
 - To review strengths and weaknesses and identify areas for improvements
 - To review career potential and discuss development plans
 - To review training needs
 - To obtain employee's feedback about the organisation
 - To improve motivation
- 1.6 For all non-teaching staff, Appraisals will take place in the Summer term. Staff will not be subject to appraisal until they have completed 12 months in post. For staff who join the school part way through the academic year the appraisal process will start the following year.

2. Equality and Diversity

- 2.1 The full range of Appraisal and Development opportunities includes all support staff irrespective of age, disability, gender reassignment, marital or civil partner status, pregnancy or maternity, race (including colour, nationality, ethnic or national origin), religion or belief, sex or sexual orientation or whether the employee is full time or part time, or employed on a temporary or permanent basis
- 2.2 The school's policy is to ensure that no employee receives less favourable treatment on the grounds described in 2.1 and is not put at a disadvantage by the setting of qualifying conditions or requirements which have the effect of discriminating on the grounds described in 2.1
- 2.3 The Governors will monitor and review the effectiveness of the equality and diversity policy periodically

3. The School Development Plan

- 3.1 The Appraisal and Development process is set within the context of the School Improvement Plan
- 3.2 The School Improvement Plan (SIP) will be communicated to all staff and all staff will be given an opportunity to contribute to the school improvement plan
- 3.3 The Governors are committed to training and developing all employees. This commitment is made through:
 - An Appraisal and Development accountability in every member of staff's job description
 - The Appraisal and Development process which involves senior staff in all appraisals
3. Learning support staff will be monitored against the Teaching Assistant National Standards.

4. Training as part of the Appraisal and Development process

- 4.1 All senior managers will normally have, as some point, some responsibility for appraising others. Appraisers will be given training to appraise and will follow the principles set out in **Appendix 1** and **Appendix 2**
- 4.2 The prospective use of new knowledge/skills will be discussed between the trainee and the appraiser or line manager prior to any training being undertaken with specific issues in the school improvement plan, targeted where possible
- 4.3 After an individual has undertaken training there will be post event evaluation as part of the Appraisal and Development process
- 4.4 All employees are required to keep an up to date record of the training that they have received
- 4.5 Line managers and appraisers will assist in identifying learning objectives and new skills to be acquired through training and feed that in to the Appraisal and Development process
- 4.6 All employees are required to complete a number of statutory training in-house as part of their development. This will include Safeguarding, Team Teach and First Aid

5. External Qualifications

- 5.1 It is the school's policy to support individuals in gaining external qualifications which are related to the School Improvement Plan
- 5.2 The agreement between the school and the employee in respect of external courses and qualifications is:

- The school will pay all course examination and other required fees for approved courses that are directly linked to the Strategic Management Plan, School Improvement Plan or future planning for school development. The costs must be identified by the employee and made clear to the Head Teacher before the beginning of the course
- The school will pay agreed travelling expenses and car parking fees
- Employees must attend all of the course sessions, complete course work and sit examinations unless prevented from doing so by sickness or other exceptional circumstances
- In the event that an employee fails an examination then the school will not normally pay re-sit fees
- Non-attendance at a course will result in course fees/exam costs being reclaimed

6. Resourcing the Appraisal and Development Process

- 6.1 The Appraisal and Development Process is regarded as a priority. An annual budget figure will be set by the Governors in the light of the identified needs and the priorities of the school improvement plan, and the financial position of the school

7. Evaluation

- 7.1 There will be regular evaluation of the effectiveness of the Appraisal and Development policy, including evaluation of costs and benefits, completed by the Executive Head Teacher/Business Manager
- 7.2 An annual summary of the Appraisal and Development process will be reported to the Governing Body

8. The Appraisal and Development Statement and Record Keeping

- 8.1 The statement will invite the appraisee to indicate that s/he is content with the statement. There will be the opportunity for the appraisee to express disagreement with the statement within ten working days of receiving the statement
- 8.2 Each individual is responsible for ensuring that his/her Appraisal and Development records, training records, TA Standards and/or witness statements, are up to date and maintained in a personally held file
- 8.3 A copy of the appraisal note will be held on the individual's personnel file. Access is restricted to those entitled to have access to the file
- 8.4 All those with access to the appraisal statement will treat it as confidential.

Appendix 1

Appraisee's checklist for the Appraisal and Development meeting

The documents you need are:

1. Your current job description (including goals and training plan if you have previously had an interview)
2. The notes from previous Appraisal and Development meeting(s)
3. Training record, Competencies Document or NVQ information if relevant in a personal portfolio

4. Please review your work since the last Appraisal and Development meeting so that you can discuss it at the meeting:

- How well have I done in relation to the goals that were set at the last meeting?
- What has been happening, of note, in my area of work?
- Have there been any developments/changes/things I do differently in my work?
- Anything I am particularly pleased with or which I am not satisfied with
- What do I do well in my present job?
- What could I do better?
- What training have I had since the last meeting?
- Does my job description need to be reviewed?

5. Then forward plan by answering the following questions

- Do I see my job changing or developing?
- What new knowledge and/or skills do I need?
- What support might I need from colleagues?
- What constraints or problems do I foresee?
- What resources and/or training do I need?
- What goals do I want to achieve?

Appraiser's checklist for the preparation meeting

The appraiser should check at the initial meeting that each person has addressed each point:

1. Check the person has an up to date job description which will provide the basis of the Appraisal and Development meeting
2. Check that the person has a copy of the notes of the previous meeting - if not, provide before the Appraisal and Development meeting
3. Check that the person has copies of any competencies or training documentation
4. Check that the person understands the review process and that any queries are answered before the Appraisal and Development meeting

Appendix 2

The Appraisal and Development Interview

1. A reminder of the purpose of the discussion by the appraiser
2. A brief exchange in which each party itemises the key points to be discussed – setting the agenda
3. A discussion of the results of the aims and action agreed at the last review
4. A check against each element in the employee's job description, considering which have gone well and which less well, and why
5. Discussion and agreement on the employee's job – performance targets for the next review period
6. A similar discussion on the employee's development targets *
7. A check that there is mutual understanding of the key points and action plans
8. Set the date for the next interview

*NB

- All staff have a target linked to the expected attendance level, of 96%
- All staff are required to maintain an up to date personal portfolio
- All staff are required to set a personal target linked to the SIP ad C.P.D.