



## **Victoria Academies Trust**

### **Appraisal Policy For non- teaching staff**

## **Introduction**

The Support Staff Appraisal policy is designed to help both the school and its employees achieve priorities and targets.

It is specifically designed to enable all support staff to meet their performance demands by ensuring they receive the necessary training and development required for the tasks ahead.

The scheme is a reflective process enabling line managers and support staff to look back at past performance and at the same time look forward to new objectives. The needs of the employee to meet those objectives in terms of personal learning and development required to support their attainment, are an essential aspect of the process.

## **Application of the Policy**

The policy applies to school based employees (support staff) other than teachers employed by the school. This will include Learning Support, Site and Office staff, and any other employees who are employed on a non-teaching contract.

## **Purpose**

This policy sets out the framework for a clear and consistent process to develop the overall performance of support staff and for supporting their needs within the context of the School Improvement Plan and their own professional needs.

The policy will:

- provide a common and understandable structure for managing and developing support staff within the school in relation to set objectives and support;
- give an opportunity to agree and review individual performance and objectives;
- enable the formulation and review of an individual's training and development plan to help them achieve objectives;
- create a better managed and more effective workforce that delivers improved quality by identifying and addressing issues or barriers, which impede progress;
- give individual employees the opportunity to identify career development opportunities and talk with their manager about their aspirations.

## **Consistency of Treatment and Fairness**

The Board of Trustees are committed to ensuring consistency of treatment and fairness in the operation of appraisal. To ensure this, provisions in the appraisal are made in relation to moderation, quality assurance and objective setting

## **Responsibility**

The Head Teacher will have responsibility for the policy and implementation of the support staff appraisal process.

The Head Teacher will delegate, where appropriate the responsibility for the appraisal process to the appropriate line manager within school in accordance with the school staffing structure.

Consideration will be given to the workload of line managers in relation to the number of staff they are required to appraise in any one cycle.

## **The Appraisal Cycle**

The appraisal cycle will be an annual one. Support staff will have an appraisal meeting with their line managers on an annual basis. The cycle will be completed by the end of Spring term annually in order to inform school improvement and budget planning.

Ongoing feedback throughout the year is integral to this policy, and a range of evidence will be used when assessing performance against objectives appropriate to the individual employees role.

Employees subject to a probationary period are not included within this policy.

This process should not be used in cases where support staff are subject to procedures relating to unsatisfactory performance.

## **Setting Objectives**

Appropriate objectives in relation to the member of support staff's job description will be set at the planning and review meeting. Objectives should be achievable and proportionate to the contracted working hours. A maximum of three objectives can be set.

At the end of the cycle, the review of performance against an objective will be on the basis of the performance criteria set at the beginning of the cycle. Good progress towards the achievement of a challenging objective, even if the performance criteria have not been met in full, will be reviewed favourably.

## **Preparation for the meeting**

### **1. Date and time for the meeting**

The line manager will agree with the support staff member a suitable date and time for the planning and review meeting. All meetings must take place within the contracted working hours of the line manager and the member of support staff.

### **2. Documentation**

Documentation should be available in advance of the meeting to allow both parties to prepare thoroughly.

The only document that will be retained in the support staff's personnel file is the planning and review statement. Other documents should be used only to support the discussion.

### **3. Appraisal Planning and Review document**

This document should be completed during the planning and review meeting or no later than five working days later. This should be signed by the line managers and the support staff. Both parties should seek to agree with the contents of the planning and review statement. However, if agreement cannot be made, the line manager will have the final decision. In this circumstance this must be recorded on the planning and review statement.

Following the planning and review meeting, a copy of the signed documentation should be given to the support staff member to retain and a copy given to the Head Teacher. Within ten working days of receiving the planning statement, if the Head Teacher has any concerns in relation to the planning statement they must raise these with the line manager. A further meeting between the line manager and the member of support staff to review the statement may then be required.

A copy of the training and development annex will be given to the school's PLD leader.

### **4. Job description**

Review of performance can only be within the context of the support staff current job description. Any changes to job descriptions cannot be made during the planning and review meeting.

## **Appeals**

Should a member of the support staff be dissatisfied with any part of the performance development process, they should follow the school's grievance procedure. Where a support staff member wishes to raise more than one concern this would constitute one grievance.

## **Confidentiality**

The whole appraisal process and, in particular, the documentation generated under it, will be treated with strict confidentiality at all times. Only the line manager (or, if appropriate - s/he has more than one, each of her/his line managers) and the Head teacher (or the person to whom s/he delegates responsibility for support staff appraisal ) will have access to it. It will be retained by the Head Teacher.

## **Training and Support**

The school's CPD programme will be partly informed by the training and development needs identified in the training section of the support staff' appraisal review document.

The head teacher will ensure in planning the budget that, as far as possible, appropriate resources are made available in the school budget for any training and support agreed for support staff.

With regard to the provision of CPD in the case of competing demands on the school budget, a decision on relative priority will be taken:

1. Job related training designed to equip employees to undertake their current job
2. Initiatives designed to develop new skills and knowledge, relating to either their current role or expanding scope for progression

The school's priorities will have precedence.

Where the support recorded in the appraisal planning document has not been provided, this should be taken into account at the review meeting and consideration given to whether this should be carried forward into the following year's cycle.

## **Retention of appraisal Documentation**

Appraisal documentation will be retained within the support staff's personnel file held by School, while the employee remains in employment at the school and, after leaving the school's employ, it will be stored in the archive files for a minimum period of six years. Data protection legislation will be adhered to.

## **Monitoring and Evaluation**

The Executive head teacher will monitor the operation and outcomes of appraisal arrangements.

The Trust are committed to ensuring that the appraisal process is fair and non-discriminatory and the following monitoring data should be included in the Head teacher's report because they represent the possible grounds for unlawful discrimination:

- Race/gender/disability/age/part-time contracts/trade union membership.

The Head Teacher will report to the executive head teacher on whether there have been any appeals or representations on an individual or collective basis on the grounds of alleged discrimination under any of the categories above.

### **Access to Documentation**

Support Staff may request copies of their appraisal documentation from the Head Teacher.

Appendix (i) Non-Teaching Staff Appraisal Template

**Non-teaching staff Appraisal 20XX-XX**

Appraisee		Appraiser	
Date of Meeting			

Review of the past year, with regard to previous targets and your overall role in school	
What have been your successes (What went well)	What could be improved (Even Better If...)

Objectives for next cycle:	
Objectives	Success Criteria

Career Progression Discussion

Support, training and development required to achieve objectives (The appraisee is expected to take responsibility for their own CPD. This includes identifying CPD and re-arranging any courses etc that are missed or cancelled throughout the year.)

Appraiser comments

<b>Signed (Appraisee)</b>		<b>Signed (Appraiser)</b>		<b>Signed (HT)</b>	
-------------------------------	--	---------------------------	--	--------------------	--

<b>Appraisee comments</b>

This form remains confidential. The appraisee is given a copy of this statement with the original being retained by the headteacher.