



St Anthony's School

No: 31

**Appraisal for Support Staff
Guidance**

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APPRAISAL FOR SUPPORT STAFF GUIDANCE

1) INTRODUCTION:

- 1.1 Appraisal at St. Anthony's School is a process which enables the management of performance in the workplace and supports the development of all support staff.
- 1.2 **The aim of the process is to:**
 - **Develop and support staff**
 - **Reward staff**
- 1.3 The process provides an opportunity for managers to recognise the valuable contribution of each member of their staff. Such recognition should contribute to the development of stronger teams and whole school improvement.
- 1.4 The process is also intended to support staff in the achievement of high standards in their current role and to provide staff with the opportunity to identify appropriate training to support their future career development.

2) APPRAISAL REVIEW PROCESS AND THE ANNUAL CYCLE:

The process aims to establish that support staff are meeting expectations in respect of their responsibilities and to identify development needs. It will involve an annual process of 2 meetings to include– **Planning (initial meeting) and Reviewing (review/ final meeting).**

2.1 **Planning: Support and Training needs are discussed and agreed in line with Appraisee job description**

- Prior to the meeting staff are issued with 'Descriptors for each of the contribution levels' (Appendix 1) which describes what success or achievement will look like in each of the four aspects of the support role (a) individual objectives related to job role, (b) value and behaviour, (c) wider contribution if KR7 or above and (d) application and impact of personal development.
- Support and training must be agreed at this meeting.
- The Planning stage of the Performance Review process will normally take place at the beginning of the Term 6, i.e. June/ July when class allocations and staffing structure for the next academic year have been agreed by the Senior Leadership Team.
- The Appraiser is responsible for setting up meetings with their Appraisee.
- Staff should be given reasonable notice of the planning meeting by their Appraiser and sufficient time should be set aside (lunch breaks must not be used for this purpose). An appropriate time for the Appraiser and Appraisee meetings, for example, could be when the central class has PE whereby 2 TA's are not required.
- Prior to the date of the initiate planning meeting, each member of staff should be encouraged to consider their own role and responsibilities, as outlined in their job description.
- When the planning meeting takes place, the Appraiser and Appraisee should consider the job description and any evidence to be collected by the Appraisee in order to discuss any training that may be required. These should be recorded on the Appraisal Statement.
- Training needs should develop the individual, take account of the demands of the particular role, address the School's key priorities, and provide the opportunity to improve the staff member's professional/personal practice.
- The Appraiser and Appraisee will retain a copy of the Appraisal Statement.
- The information on training needs must be passed to the Assistant Head Teacher in charge of Teaching and Learning using a 'request for training' form.

2.2 End of Cycle Review

- The end of year review should be conducted in time, preferably Term 3, for the final pay reviews to take place in Term 4.
- The Year End review should be recorded on the Appraisal Statement document and discussed with the Appraisee at the End of Year Review Meeting.
- During the review, information/ evidence gathered through the year should be used to assess achievements, progress against success criteria and general performance against the School's Development Plan priorities.
- There should also be a discussion about areas of strength, the requirement for future development, training or support and future career development.
- Both the Appraiser and Appraisee must sign the final review document to indicate agreement that recordings are accepted as a true record.

2.3 Total Contribution Assessment

- As part of the end of year review, a formal assessment is required from the Appraiser. Once the recommendation has been completed the information is passed onto the Head Teacher who will moderate the assessment of which results will be compared when considering pay reviews.
- It is essential that the system is fair, consistent and unbiased meaning it is important that there is consistency in approach to assessment against known criteria and personal development.

2.4 Complaints/Appeal Process

- The Appraisal process must be objective, fair and consistent and the documentation should be able to validate the process and show how the total contribution assessment was arrived at. It is important that you keep this information safe.
- If a member of staff has a serious concern about the Appraiser nominated to conduct their review, this should be expressed in writing to the Head Teacher, giving reasons for concern. Whilst the Head Teacher will give due consideration to every such concern they will make the final decision taking account of operational issues.
- Within 10 working days of receiving the review statement, members of staff can record their dissatisfaction with aspects of the review, in writing to the Head Teacher. Where these cannot be resolved with the Appraiser they can raise their concerns with the Head Teacher. Where the Head Teacher is the Appraiser, complaints should be raised with a nominated member of the Governing Body.
- A review of the complaint should be conducted within 10 working days of referral.
- The Head Teacher or Governors may decide that the review should remain unchanged or may add observations of his/her own. He/she may decide, with the agreement of the Appraiser, to amend the review statement or declare that the review statement is void and order a new review or part of the review to be repeated.
- Where a new review is ordered, the Head Teacher will appoint a new Appraiser after discussion with original Appraiser to carry out the review, or part review, which should be conducted within a further 15 days.
- The complaints procedure does not remove an employee's right of recourse to the grievance procedure at any stage.
- Any appeal of the final assessment decision must be given in writing from the Appriasee to the Chair of Governors within 10 days of receiving decision form the Head Teacher.
- During the appeal meeting, The Chair of Governors will evaluate the Appraiser documents, Appraisee evidence and the Head Teacher's assessment decision at which a Union representative or colleague can accompany if deemed necessary.
- The Chair of Governors must complete this review within 5 working days and submit, via writing, to both the Head Teacher and Appriasee the final outcome of the appeal.

2.5 **Managing Weak Performance**

- Concerns about levels of performance should generally be picked up as part of the routine monitoring process across school and addressed through usual management procedures as well as the Appraisal Review process.
- This process may identify serious deficiencies in a staff member's performance that it may not be possible to address within the Appraisal Review process alone. Where this occurs, it may be appropriate to initiate the School's Capability Procedure.
- As part of any action under the Capability Procedure the staff member and their representative will be provided with the evidence from the Appraisal Review process if relevant.

2.6 **Data Protection and Confidentiality**

- The Appraisal process includes personal information which is confidential. Staff must therefore ensure that the documents are kept in a safe and secure place and that confidentiality is respected. This is important not only to comply with data protection laws but also to help ensure the Appraiser/Appraisee relationship encourages open and honest feedback.
- No additional notes will be added to the documentation once agreed and signed between Appraiser and Appraisee. This would invalidate the objectivity, fairness and consistency of the process.

2.7 **Review of the Appraisal Review process for Support Staff at St. Anthony's School**

- The Head Teacher will report annually to the Governing Body on the operation of the Appraisal Review procedures in the School and the training and needs of all support staff.
- The Governing Body and the Head Teacher will review the operation of this guidance document annually which will be updated and amended as required, to ensure compliance with regulations and changes which may from time to time be introduced by the Department for Education.

2.8 **Pay progression will coincide with St. Anthony's Policy No: 26 Pay and Rewards. Support Staff Appraisal Guidelines**

1. Criteria for Pay Progression

Pay progression for support staff is determined by an annual assessment of their Total Contribution to the School in 4 areas:

- Performance against the individual's objectives (Maximum of 3 objectives)
- Values & behaviours demonstrated
- Their wider contribution to the school*
- The application & impact of any personal development undertaken (CPD platform)

**Employees on grade KR7 and above only*

2. An Employee's performance is assessed against one of 4 contribution levels:

- Performance Improvement Required
- Successful Performance
- Excellent Performance
- Outstanding Performance

Descriptors for each of the contribution levels are set out below in Appendix 1 and Appraisers should refer to this when making their recommendations.

3. Meetings:

- The Appriasee is expected to collect and collate any evidence to be used for the meetings with the Appraiser.
- When recording evidence it is acceptable for the Appraiser to consider their knowledge of the Appriasee and therefore verbal evidence can be recorded if deemed necessary.

Initial Meeting Term 6 (June/July 2019)	Starts the new cycle by reviewing job description, discussing expectations and talking through the process.
Review Meeting End of Term 3 (Feb 2020)	To complete the Appraisal cycle and send recommendation to Head Teacher on Appraisal rating.
Moderation Process Term 4 (March 2020)	Head Teacher moderation of recommendations
Moderation Process Term 4 (March 2020)	Chair of Governors approval and staff informed of ratings
Appeals Term 4 (March 2020)	Appeals Process and Final Outcome

Support Staff Teams 2020-2021

43 Support Staff

Robert Page	Kate Ford	Kirstie Phippin		
Paul Barrett	Colin Lawton Sue Holmes	John Buckley	Richard Walker	Molly Barnes
Abi Cranson	Michela Gianquinto Silas Kidner	Jordan Mott Kimberley Ochs	Jennifer Todd	Ame Friend
Antony Curry	Maria Greenslade			
Kate Ford	Rachel Beecham	Louisa Chapman	Elizabeth Martin	2x Catering Assistants
Gill Ward	Donna Crump	Alison Clarke		
Natalie Stapley	Donna Haywood	Jacqui Edwards		
Katy Wren	Kerry Weller	Heather Leal		
Katie Wood	Rebecca Bone			
Sally O'Connor	Pam Joy	Sarah Godfrey		
Viv Wright	Melissa Pearce	Liz Hollies	Trish Fetherston	
Kate Wathey	Jon Adams	Naz Ali		
Amy Tye	Jackie Benson	Jodie West		
Catrina Jones	Jade Martin	Megan Parr	Alison Amos	
Adela Granger	Katie Clark	Paula Ward		
Joshua Steele	Sara Musslewhite	Claire Price		
Craig Kelly	Josh Obbard			
Derek Cronje				

Appendix 1: Assessment Definitions

Contribution Level	Summary of Definition
<p>Not Assessed</p>	<p>Assessment was not made because of</p> <ul style="list-style-type: none"> • Individual is leaving or is new to post and there is insufficient evidence on which to make an assessment and assessment is deferred. <p>or</p> <ul style="list-style-type: none"> • The employee’s performance is being monitored and reviewed within the school’s formal capability procedure. <p>or</p> <ul style="list-style-type: none"> • The employee does not have the required length of service by the date of the award.
<p>Performance Improvement Required</p>	<p>Employee did not achieve the standards expected in the job. This may be due to one or a combination of:</p> <ul style="list-style-type: none"> • One or more performance management objectives not being met without adequate explanation. • Evidence of behavior or conduct contrary to that expected in the role. • Employee did not achieve the standards expected in the job. Among other reasons this may arise when an individual has not had regular attendance or not performed to their usual standard. • Overall standards of performance in the job are less than expected.
<p>Successful Performance</p>	<p>The employee has achieved all the performance objectives or if this is not the case but there is an understandable and acceptable reason for this.</p> <p>A successful rating should be given to any employee who is on extended sick leave at the time of assessment is due or who has had several periods of sickness absence/ who has taken Family Leave.</p> <p>Additionally performance generally is consistently sound across all key areas of the role and the behaviors demonstrated by the employee consistently positive.</p> <p>In common terms an employee with this assessment would be regarded as sound, positive, reliable and doing a ‘good job’ all round and there will be a range of evidence to substantiate this.</p>

<p>Excellent Performance</p>	<p>Employees at this level will be those whose performance clearly stands out as above the norm. Their work will be seen to be consistently of a high calibre with a sense of pride in the quality of their work. Performance objectives will have been met and exceeded in some way unless the objectives were regarded as 'stretch' targets or particularly challenging in some way.</p> <p>There will be evidence of using own initiative and taking personal responsibility to seek out new tasks or responsibilities that are desirable, appropriate and have a positive impact on children and/or colleagues.</p> <p>The employee will also consistently demonstrate very positive behaviors towards their work, children and colleagues with clear evidence of effective outcomes.</p>
<p>Outstanding Performance</p>	<p>Performance objectives will be delivered to an exceptionally high standard. The quality of work throughout the year will be regarded as first class and impressive in terms of what is achieved and how it is delivered.</p> <p>Employees at this level will be regarded by others as 'exceptional' in their role and they demonstrate exceptionally positive behaviors towards children, parents (if appropriate to role) and colleagues.</p> <p>There will be clear evidence of often going the 'extra mile', of doing things over above expectation on a regular basis and constantly demonstrating behaviors consistent with the values, principles and ethos of this school.</p>

Appendix 2: MEETING TEMPLATES

**ST. ANTHONY'S SCHOOL
APPRAISAL STATEMENT 2020/2021**

APPRAISEE:

APPRAISER:

Date:

INITIAL MEETING – TERM 6, 2020

Individual Objectives (2 or 3 Objectives)

Online CPD -Minimum of 4 Course (2 Statutory and 2 optional)

Titles:

Other Discussion Points

Appraiser - Sign and date

Appraisee - Sign and date

REVIEW MEETING – BY END OF TERM 3 2021

APPRAISEE:

APPRAISER:

Review Statement

End of year Statement written by Line manager (Appraiser)	<u>Individual Objectives (2 or 3 Objectives)</u>
	1.
	ACHIEVED WITH EVIDENCE YES/ NO
	2.
	ACHIEVED WITH EVIDENCE YES/ NO
3.	
ACHIEVED WITH EVIDENCE YES/ NO	
	<u>Online CPD (Minimum of 1 Course)</u>
	ACHIEVED WITH EVIDENCE YES/ NO

Other Discussion Points

Kent Range Appraisal Rating recommended by Appraiser/ Appraisee to Head Teacher:

Kent Scheme Rating-Please indicate

1. Outstanding performance	2. Excellent Performance	3. Successful Performance	4. Performance improvement required	5. Not assessed
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Appraisee:

Appraiser:

Signed:

Signed:

Date:

Date:

When completed pass onto Head Teacher for Moderation

Moderation Process & Final Appraisal Rating Agreed: HEAD TEACHER ONLY

1. An Outstanding performance	2. Performed above the required standard	3. Achieved the required standard	4. Performance improvement required	5. Not assessed
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Signed (Head Teacher)

Document Title:	Support Staff Appraisal
Version:	K-SENT Version 2
Prepared by:	Mr Paul Barrett AHT T&L
Date for Next Review:	March 2021
Link on School Website	