



Appraisal Policy for Non-Teaching Staff

Document Name	Approval Date	Next Revision Date
Appraisal Policy for Non Teaching Staff		
- V1.0 Based on WSM Standard	October 2015	October 2018
- V1A Re-approved with no substantive changes	03/10/2018	02/10/2021

The Directors have paid due regard to the impact of all aspects of equality in the writing of this policy

1 APPLICATION OF THE POLICY

- 1.1 The policy applies to the all non-teaching employees of the Trust except those who are the subject of capability procedures. Appraisal is central to both improvement within the Trust and employees' personal development, as on-going supportive process.

2. PURPOSE

- 2.1 This policy sets out the framework for a clear and consistent assessment of the overall performance of non-teaching staff and for supporting their development within the context of the needs of the individual schools and across the Trust.

- 2.2 The objectives of this policy are:

- To ensure consistency of treatment and fairness.
- To set rigorous, challenging and achievable objectives for all staff, which are equitable in relation to staff with similar roles, responsibilities and experience.
- To ensure that objectives are set in line with the identified priorities for an individual for the cycle.
- To ensure strict confidentiality in all aspects of the appraisal process.
- To ensure that an individual's development is informed by the identified needs.

3. THE APPRAISAL CYCLE

The appraisal period will normally run from September to July.

The appraisal cycle will run **on an annual basis**. Appraisal planning and reviews should be completed for all non-teaching staff by 31 October.

Employees who are employed on a fixed term contract of less than one year will have their appraisal managed in accordance with the principles underpinning the provisions of this policy. The length of the cycle will be determined by the duration of their contract.

Where an employee starts his/her employment part-way through a cycle, the line manager shall determine the length of the first cycle for that employee, with a view to bringing his/her cycle into line with the cycle for other employees as soon as possible.

Where an employee transfers to a new post within the Trust part-way through a cycle, the new line manager shall determine whether the cycle shall begin again.

4. APPOINTMENT OF REVIEWERS

All reviewers must be appropriately trained to appraise staff effectively and ensure equal treatment.

The maximum number of appraisees that any line manager will be expected to undertake per cycle is 6.

5. OBJECTIVE SETTING, ASSESSMENT AND FEEDBACK

Each individual will have an Appraisal Statement which documents

- their priorities and objectives for the year
- their development needs and actions,
- interim review observations
- the end of year review.

Observation within or outside the classroom setting may form part of the appraisal cycle. Oral feedback will be given as soon as practicable and written feedback if appropriate will be provided within 5 working days of the observation.

An interim review may be undertaken approximately mid-way through the appraisal cycle. At the end of the appraisal cycle a final review will be undertaken, documented and signed by both the individual and the reviewer.

The CEO or Head of School will moderate all planning statements to check that the priorities, objectives, development actions and reviews:

- are consistent between those who have similar experience and similar levels of responsibility
- comply with the school's appraisal policy and the requirements of equality legislation
- are consistent with the plans and overall capacity for staff development

6. TRAINING AND SUPPORT

- The Trust wishes to encourage a culture in which all employees expect to have access to training that is linked to improvement priorities within the Trust and to their own individual ongoing development priorities and needs.
- The Trust's development programme will be informed by the training and development needs identified in appraisal statements.
- The Trust will ensure in the budget planning that, as far as possible, appropriate resources are made available in budgets for any training and support agreed for appraisees.
- An account of the training and development needs of employees in general, including the instances where it did not prove possible to provide any agreed development support, will form a part of the CEO's annual report to the Trust Board about the operation of the appraisal process.

7. CONFIDENTIALITY

- 7.1 The whole appraisal process and the statements generated under it, in particular, will be treated with strict confidentiality at all times.
- 7.2 Only the CEO, the appraisee's Head of School and line manager or, where s/he has more than one, each of her/his line managers will be provided with access to the appraisee's plan recorded in her/his statement, upon request, where this is necessary to enable the line manager to discharge her/his line management responsibilities. Appraisees will be told who has requested and has been granted access.

8. MONITORING AND EVALUATION

The Trust Board will monitor the operation and outcomes of appraisal arrangements.

The CEO will provide the Trust Board with a written report on the operation of the Trusts' appraisal policy annually. The report will not contain any information which would enable any individual to be identified. The report will include:

- the operation of the appraisal policy;
- the effectiveness of the appraisal procedures;
- training and development needs.

The CEO will also report 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

9. CONSISTENCY OF TREATMENT AND FAIRNESS

The Trust is committed to ensuring consistency of treatment and fairness in the operation of appraisal.

The CEO will oversee the appraisal process and take whatever steps are needed to ensure moderation, quality assurance and objective setting.