



Support Staff Appraisal Policy

This policy has been adopted by: Cinnamon Brow CE Primary School	Date: 09/10/25
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DOCUMENT STATUS

Version	Date	Action
1	April 2016	Initial Draft – agreed at JCC July 2016
2	October 2024	Review

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1. PURPOSE

- 1.1 This policy sets out the framework for a clear and consistent assessment of the overall performance of support staff, and for supporting their personal and professional development within the context of the school's priorities.
- 1.2 In addition to supporting the professional development of support staff, the appraisal process may be used to address any initial concerns that are raised about performance. If concerns are such that they cannot be resolved through this process, then consideration of whether to commence the Managing Employee Performance (Capability) procedure will be given.

2. SCOPE

- 2.2 This policy applies to all non-teaching employees in schools, except those on contracts of less than one term, those who are subject to a six month probationary review period and those who are subject to the Capability Procedure.
- 2.3 Separate arrangements exist for the Appraisal of Teachers.

3. PRINCIPLES

- 3.1 Appraisal in this school will be a supportive and developmental process designed to ensure that all employees have the skills and support they need to carry out their role effectively and develop their practice/career. It will help to ensure that employees are able to continue to improve their professional practice and to develop in their role.
- 3.2 The process is designed to ensure that all employees know precisely what is expected of them in terms of their role at school and the standards they are to work to.
- 3.3 The appraisal process is a two-way process and provides the opportunity for the employee and the line manager to set and agree objectives and targets and to identify development needs.
- 3.4 Employees will have their performance reviewed against clear, relevant, achievable and agreed criteria.
- 3.5 A practical and flexible approach to conducting appraisals will be taken for those absent on maternity leave, long term sickness absence, including the consideration of reasonable adjustment where appropriate.
- 3.7 Training and development needs will be identified through the appraisal process in order to assist the employee to perform effectively in their job.

4. CONFIDENTIALITY STATEMENT

- 4.1 All parties involved in this policy will be expected to observe the principle of confidentiality in relation to the contents of appraisals and any documentation that arises thereof.
- 4.2 Any documentation arising from any discussions during appraisal meetings may be shared by the Headteacher/line manager with individuals involved in monitoring performance, or those involved in any capability proceedings that may follow and for quality assurance/moderation purposes.
- 4.3 Documentation arising from any discussions during appraisal meetings should be stored securely and not stored, either electronically or manually, in any public areas in school/on the school's computer network.

5. THE APPRAISAL PERIOD

- 5.1 The appraisal period will run for 12 months, from _____ to _____ each year. Employees who are employed on a fixed term contract of less than one year will have their performance managed in accordance with the principles underpinning this policy.
- 5.2 The appraisal meeting should take place at the start of the appraisal cycle or as soon as possible thereafter.
- 5.3 At this meeting, performance during the previous appraisal period will be reviewed as will any training and development needs. Performance objectives will also be set for the forthcoming appraisal period. Some performance objectives could be carried forward into the subsequent appraisal period if necessary/appropriate. It may be deemed appropriate at the annual appraisal meeting to set an interim review meeting part-way through the appraisal period. The necessity of this will depend on the nature of the role, the nature of the performance objectives and/or where there are concerns about performance.
- 5.4 The appraisal form (Appendix A) should be used to record the meeting. Any paperwork that will be referred to at the appraisal meeting should be provided prior to the appraisal meeting (including a copy of the last appraisal). At the end of the meeting a fully signed copy should be provided to the employee and a copy should be retained by the line manager for reference purposes at the next appraisal meeting and any interim appraisal meetings.
- 5.5 The assessment of performance and of training and development needs will inform the planning process for the following appraisal period.

- 5.6 It will be a matter for individual schools to determine whether or not it will be necessary to hold an interim appraisal meeting part-way through the appraisal period.
- 5.7 Where an employee transfers to a new post within the school part-way through a cycle, the Headteacher shall determine whether the period shall begin again and who will do the assessment.

6. SETTING OBJECTIVES

- 6.1 Objectives will be set before, or as soon as practicable after the start of each appraisal period. The objectives set will be Specific, Measurable, Achievable, Realistic and Time-bound (SMART) and will be appropriate to the employee's role and level of experience.
- 6.2 The line manager and employee will seek to agree the objectives but, if that is not possible, the line manager will determine the objectives. Objectives may be revised if circumstances change. Objectives will be quality assured/ moderated across the School to ensure that objectives set are consistent across employees with similar roles, experience and levels of responsibility.
- 6.3 The objectives set for each employee will, if achieved, contribute to the school's priorities, and will include a description of what success may look like. The objectives may also take into account the professional aspirations of the employee and their current job description.
- 6.4 The number and depth of targets should be appropriate to the employee, their individual circumstances and their role in school.
- 6.5 The appraisal process should include an assessment against the employee's Job Description and a review of the Job Description to ensure it is still relevant.
- 6.6 The appraiser will take into account the effects of an individual's circumstances, including any disability, when agreeing objectives. When staff return from a period of extended absence, objectives may be adjusted to provide opportunity for them to readjust to their working environment.

7. REVIEWING PERFORMANCE

- 7.1 There are a variety of ways to assess the employee's performance and development against the objectives set during the appraisal process. This will depend very much on the following:
 - (i) If the employee has continued to undertake all aspects of their role to a satisfactory standard;

- (ii) If the employee has undertaken any additional training during the appraisal cycle;
- (iii) If, with the benefit of hindsight, the objectives set at the start of the appraisal period were relevant/appropriate and if there have been any extenuating circumstances which means that certain objectives could not be met;
- (iv) The role of the employee;
- (v) Feedback from other appropriate staff in school for example feedback from Teachers regarding Teaching Assistants, feedback from Site Supervisors regarding Cleaners and feedback from Schools Business Managers regarding business support staff.

7.2 In situations where the employee's performance becomes a cause for concern, additional review meetings may take place and additional support discussed, to assist the employee in achieving their objectives. During any additional meetings, the line manager will clearly outline the nature of the concerns, so that the employee is fully aware of what is required to achieve their objectives.

7.3 Incremental pay progression will be automatic unless capability procedures are invoked.

9. DEVELOPMENT AND SUPPORT

9.1 Appraisal is a supportive process which will be used to inform continuing professional development. The school wishes to encourage a culture in which all employees take responsibility for improving their performance through appropriate professional development. Professional development will be linked to school priorities and to the ongoing professional development needs and priorities of individual employees.

9.3 The school CPD program will be informed by the training and development needs identified as part of the appraisal process. In this regard, the Governing Board will ensure that in budget planning, as far as possible, resources are made available in the school budget for appropriate development opportunities.

9.4 In the case of competing demands on the school budget in relation to CPD opportunities, a decision on relative priority will be taken by the Headteacher with regard to the extent to which:

- (a) the training and support will help the school achieve its priorities; and
- (b) the CPD identified is essential for an employee to meet their objectives.

Appraisal form

Use this model form to record the issues discussed at an employee's performance appraisal meeting.

Employee's name:	
Job title:	
Manager:	
Date of meeting:	
Current performance	
Objective/competence 1:	
<i>This section should be used to record discussion on the key areas of the job, and include a summary of achievement against the objectives that have been previously agreed.</i>	
Objective/competence 2:	
Objective/competence 3:	
Development summary:	
<i>This section should be used to record any areas of the employee's work where further training and support is required, and any areas where performance is particularly strong and should be developed further.</i>	
Development and training	
<i>This section should list specific requirements for any training or development. These activities are not restricted to training courses, and may include attachments, projects, coaching, planned experience or any other suitable activity that will enhance the skills, knowledge and behaviour required in the employee's work or to develop him/her further.</i>	
Career planning	
<i>This section should record any areas of the department or Company in which the employee has expressed a specific interest.</i>	
Other areas of discussion	
<i>This section should record any other points raised at the appraisal meeting.</i>	
Assessment Level	
This is based on performance over the year against objectives achieved	

Outstanding performance <i>(Objectives exceeded and competencies more than fully demonstrated)</i>	
Standard performance <i>(Objectives met and competencies fully demonstrated at required levels)</i>	
Less than standard performance with development needs <i>(Most objectives met but development required to fully meet all objectives)</i>	
Unsatisfactory performance <i>(Performance unacceptable; objectives not met and competencies not demonstrated)</i>	
Employee's signature:	
Appraiser's signature:	
Date:	
Reviewing manager's signature:	
Date:	
One copy of this completed form will be kept by the appraiser, one by the appraisee and one in the employee's personnel file.	
