

Support Staff Appraisal Policy

Policy Code:	HR40
Policy Start Date:	December 2025
Policy Review Date:	October 2027

Please read this policy in conjunction with the policies listed below:

- HR8 Equal Opportunities and Diversity Policy
- HR6 Data Protection Policy
- HR12 Staff Disciplinary Policy and Procedure
- HR30 Support Staff Capability Policy

1 Policy Statement

- 1.1 This policy shall apply to all Support Staff of The Priory Federation of Academies Trust (The Trust). It does not apply to those on contracts of less than one term or any external agencies that the Trust may use.
- 1.2 This policy sets out the framework for a clear and consistent assessment of the overall performance of all support staff within the Trust by supporting their development within the context of the Trust's development plans.
- 1.3 References to the Trust or Academy within this policy specifically include all primary, secondary and special academies within the Trust, as well as the Early Years setting at the Priory Witham Academy, Priory Apprenticeships and Lincolnshire ITT.
- 1.4 This policy does not form part of any member of staff's contract of employment and it may be amended at any time.

2 Roles, Responsibilities and Implementation

- 2.1 The Pay, Performance and HR Committee has overall responsibility for the effective operation of this policy and for ensuring compliance with the relevant statutory framework. This committee delegates day-to-day responsibility for operating the policy and ensuring its maintenance and review to the Head of Human Resources.
- 2.2 Leaders and Managers have a specific responsibility to ensure the fair application of this policy and all employees are responsible for supporting colleagues and ensuring its success.

3 Aims

- 3.1 Appraisals within the Trust will be a supportive and developmental process designed to ensure that all support staff have the skills and support they need to carry out their role effectively. It will help to ensure that employees are able to continue to develop and improve their professional practice, whilst recognising how they can contribute to the wider work of the Trust.
- 3.2 This process for support staff is not monetary and no automatic increment is included. It should be used to review an employee's performance and make future plans and is also an opportunity to highlight any learning and development requirements.

4 Support Staff Appraisal Period and Structure

- 4.1 The support staff appraisals will occur on an annual basis and will commence in Module 2 of each academic year. All appraisals will need to be conducted and completed during this time each year. Appraisal forms will be shared with all support staff via their iTrent Employee Self Service and guidance will be shared with the relevant Line Managers to ensure that appraisals are conducted within the timeframes outlined in this section.
- 4.2 Employees will be notified of whom their appraiser is before or as soon as practicable after the start date of each appraisal period.
- 4.3 The Academy PA and/or Line Manager should contact their employees to arrange the appraisal meetings. Staff employed at Central Services will be contacted by their Line Manager or Service Lead to arrange their appraisal meeting.
- 4.4 The appraisal form should be reviewed by the appraisee prior to their appraisal meeting.
- 4.5 The appraisal meeting will be a face-to-face meeting and be held in private, unless otherwise agreed. The Trust is fully committed to ensuring that all those conducting appraisals are provided with the appropriate training required.
- 4.6 There is no required length of time for an appraisal; however, the Trust expects enough time to be given to ensure employees have the opportunity to discuss the appraisal form, and any other areas relating to their development; this would generally be expected to take an hour.
- 4.7 Support staff who would like to change their appraiser, on professional grounds, are expected to explain their concerns to the Head of Academy/Service Lead. This request must be made in writing and, should there be reasonable and/or justified circumstances, an alternative appraiser may be appointed. If this request is rejected, the appraisee will be advised in writing. Support staff can only request an alternative appraiser once in the appraisal period.
- 4.8 Employees who are within their probationary period will have their performance managed in line with the Trust's probationary review process and agreed review periods. However, the appraisal principles set out in this policy will still apply.

5 Objectives

- 5.1 The Trust sets one objective for all support staff and personalised approaches to meeting this will be discussed and agreed. The standard objective set by the Trust is:

- To deliver the duties of your role effectively and efficiently

5.2 The objective contributes to the improvement of the Trust's provision and performance and appraisers will therefore be expected to align individual approaches to meet the objective with the Trust's priorities.

5.3 The approaches to meeting objectives will be specific, measurable, achievable, realistic and time bound and will be appropriate to the employee's role and level of experience.

5.4 The Trust has a duty to have a regard to the work life balance of all employees and the objectives will reflect this.

5.5 While the objective may not be revised if the role/responsibilities/personal circumstances of the employee changes during the appraisal period, the approaches to the specific areas of development may be altered. In addition, if an employee is absent for a significant period of time during the appraisal period, due to maternity leave or ill health, the Trust is committed to ensuring that the individual does not suffer any detriment as a result. In these circumstances, the appraisal outcome may be based on the performance outcome from the previous 12 months.

5.6 The appraiser and the appraisee should aim to agree the areas of development, but if that is not possible, the appraiser will determine them.

5.7 Professional Standards are used within appraisal conversations with Occupational Experts/Instructors and Teaching Assistants. The Trust has adopted these national Standards to support staff in identifying areas for development and improvement which can be the focus for professional learning and development.

6 Reviewing Procedure

6.1 There will be no formal observation; observation of the appraisee's work will be seen through the output of the work on a daily basis during the appraisal period.

6.2 Following the appraisal process, if there is a particular area of the employee's work that requires attention, appropriate action will be taken under the Support Staff Capability Policy.

7 Development and Support

- 7.1 Appraisals are a supportive process, which are used to identify any opportunities for professional learning (PL). The Trust wishes to encourage a culture in which all employees take responsibility for improving their skills through appropriate professional learning. The Trust is committed to supporting appropriate and reasonable development which will not only assist employees in their role but also leads to improvements in performance across the Trust.
- 7.2 As an Apprenticeship Provider, the Trust is committed to delivering accredited training programmes to allow members of Support Staff to access high-quality professional learning. Appraisers will discuss relevant courses which will support colleagues to develop themselves and their careers in appraisal meetings.

8 Transition to Capability

- 8.1 Performance management is an ongoing process. If an employee demonstrates underperformance and has not responded to support provided within the appraisal process, the employee will be notified that their performance will be managed under the Trusts Support Staff Capability Policy (HR30).

9 General Principles Underlying This Policy

9.1 Confidentiality

The appraisal process and the supporting documentation will be treated with strict confidentiality at all times. However, the desire for confidentiality does not override the need for Headteachers/Service Leads and the Trust to quality-assure the operation and effectiveness of the appraisal system. Only those who need access to such information will be granted access, to enable them to discharge their responsibilities as directed by the Trust. Trust expects all those involved in a member of staff's appraisal to keep all subject matters confidential in respect of the individual. Any breaches of this confidential agreement may be liable to action under the Trust's Staff Disciplinary policy.

9.2 Consistency of treatment and fairness

In its oversight of the appraisal system, the Trust is committed to ensuring consistency of treatment and fairness and to abide by relevant equality legislation including the duty to make reasonable adjustments for disabled employees. The Trust is aware of the guidance on the Equality Act 2010 issued by the Department for Education.

10 Policy Change

10.1 This policy may only be amended or withdrawn by The Priory Federation of Academies Trust.

The Priory Federation of Academies Trust Support Staff Appraisal Policy

This Policy has been approved by the PP&HR Committee:

Signed..... Name..... Date:

Trustee

Signed..... Name..... Date:

Chief Executive Officer

Signed..... Name..... Date:

Designated Member of Staff

Please note that a signed copy of this agreement is available via Human Resources.