

## Support Staff Appraisal Policy

Policy Code:	HR40
Policy Start Date:	January 2019
Policy Review Date:	January 2022

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

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

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## **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. Those members of staff who are under their probation period or employed as an apprentice will not be part of the support staff appraisal cycle. These members of staff will have reviews under the terms of their probation period.
- 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 Training, Priory Apprenticeships, Lincolnshire Teaching School Alliance and Lincolnshire Teaching School Alliance SCITT.
- 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.
- 1.5 The Trust is committed to leading a mentally healthy organisation, which includes a commitment to and promotion of emotional wellbeing and mental health. Therefore, all Trust policies and procedures ensure this commitment is incorporated in order to support all staff and students. Members of staff are encouraged to speak to their line managers, and students are encouraged to speak to any member of staff, if they feel any part of this policy would affect their emotional wellbeing and mental health. Any such comments should be passed to the Trust's HR department (via [FederationHR@prioryacademies.co.uk](mailto:FederationHR@prioryacademies.co.uk)) for appropriate consideration at the next available point in the policy review cycle.

## **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 Human Resources Director.
- 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.

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### **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 is to review an employee's performance and future plans. It is also an opportunity to highlight any learning and development requirements.
- 3.3 The objectives for conducting the support staff appraisals may include, but are not limited to:
- Setting new goals
  - Resolving issues
  - Strengthening working relationships
  - Assessing training needs
  - Refocusing the team/department

### **4. Support Staff Appraisal Period and Structure**

- 4.1 The support staff appraisals will occur on an annual basis and will commence in Term 3 of each academic year and all appraisals will need to be conducted and completed towards the end of March. The Academy's Administration team will distribute all forms and guidance to the relevant Line Managers to ensure the appraisals are conducted within the outlined timeframes in this section. In the case of central services support staff, the forms will be sent to the Line Managers by the Human Resources department.
- 4.2 Support staff will be informed of their appraisal date 10 days before, and will also be sent their appraisal form which is to be completed and submitted to the Line Manager who will be completing the appraisal five days before.
- 4.3 Support staff who would like to change their appraiser, on professional grounds, are expected to explain their concerns to the Head of Academy. 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.
- 4.4 The appraisal meeting will be a face-to-face meeting and be held in private. The Trust is fully committed to ensuring that all those conducting appraisals are provided with the appropriate training required.

4.5 There is no required length of time for an appraisal; however, the Trust expects enough time to be given to ensure all objectives are discussed; this would generally be expected to take an hour.

## **5. Objectives**

5.1 Objectives will be set for certain positions within the Trust, which is included in the appraisal paperwork. The objectives set for each individual will take into account the following:

- relevant occupational standards;
- the individual's job description;
- the person specification relating to the individual's role.

5.2 The objectives set out for each employee will be specific, measurable, achievable, realistic and time-bound and will be appropriate to the staff member's role and level of experience.

5.3 The objectives must contribute to the improvement of the Trust's educational provision and performance. Appraisers will therefore be expected to align individual approaches to meeting objectives with the Trust's priorities.

5.4 Objectives may be revised if the role/responsibilities/personal circumstances of the employee changes during the appraisal period. 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.

5.5 The appraiser and the appraisee should aim to agree the objectives, but if that is not possible, the appraiser will determine the objectives. For the avoidance of doubt, the appraisee may record their comments in writing as an appendix to the appraisal statement.

## **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 in conjunction with the Academies HR Business Partner.

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## **7. Development and Support**

- 7.1 Appraisals are a supportive process, which are used to identify any opportunities for continuing professional development (CPD). The Trust wishes to encourage a culture in which all employees take responsibility for improving their skills through appropriate professional development.

## **8. Confidentiality and Equality**

- 8.1 Access to a member of staff's appraisal will be limited to the appraisee, the appraiser and the Human Resources Director and/or nominated members of the Senior Leadership Team. A member of the HR Team, acting on behalf of the Human Resources Director, may have access to the appraisals as they will undertake the collation process. The 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.

- 8.2 The Trust is committed to ensuring a strict consistency of treatment and fairness and abides by all relevant equality legislation throughout the annual support staff appraisal process.
- 8.3 The Human Resources Director will quality assure a sample of appraisal paperwork in each appraisal period to ensure consistency and fairness, any concerns will be raised and discussed with the Head of the Academy.

## **9. Policy Change**

- 9.1 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.