



Mayfield Primary School

27. Appraisal for Teachers & Support Staff

Our Vision. Our intention. Always start with why!



Valuing

Every Achievement

Social - Academic - Moral - Personal

We know that intention can be easy words that look and sound effective. Our true intention is one that is enabled and implemented by the actions we take to show that we mean what we say. Mayfield is committed to building a school that is viewed from the children's eyes. We ask ourselves: How will they approach this? What do they already know? What skills will they bring? Which groups require input? How do we need to teach this? What will engage them? How long do they need? What do they need us to teach them now?

So....

we know our children must be the busiest people in any room. Children must have 'active purpose' and we must erase 'learned helplessness'. Our children's starting points are a vital consideration. We must keep teaching groups as small and precise as possible. Their independence and resilience is imperative. Their strong attendance and punctuality is paramount. We want **everyone** to embrace mistakes and never be afraid to learn from them. We will draft, repeat, refine and polish to achieve lasting progress. Learning is not a rapid, one stop shop. We will talk, listen, perform and present to foster confidence. We must rapidly build vocabulary. Marking **must** have a clear purpose, a response and be as 'live' as possible. We are constantly developing a curriculum that meets our children's needs and it must utilise and embrace our unique location. Classroom layout and design is essential. A unique environment must be generated.

We must provide a flexible and responsive timetable and lesson structure. Our teachers must adopt and explore many teaching styles. Social times are a chance for new ideas and to be viewed as a new opportunity and we must be insistent and consistent to foster positive behaviours. We are not afraid to change. We will dare to do and learn. We will challenge established thinking.

We will use common sense. We accept the fallibility of being human. We are not perfect.

We are proud to accept and respect everyone.

Enabling

Every Achievement

Genuine. Honest. Passionate. Take our hand. Change the landscape.

*** Mayfield Primary School is committed to valuing diversity and to equality of opportunity. We aim to create and promote an environment in which pupils, parents/carers and staff are treated fairly and with respect, and feel able to contribute to the best of their abilities. We recognise that it is unlawful to take into account anyone's gender, marital status, colour, race, nationality, ethnic or national origin, disability, religious beliefs, age or sexual orientation. ***

MAYFIELD PRIMARY SCHOOL APPRAISAL POLICY FOR TEACHERS

Mayfield adopts the LCC Model Appraisal Policy (SEPTEMBER 2022)

The Governing Board of Mayfield Primary School adopted this policy on 1st September 2022. The policy will be reviewed on an annual basis.

This Policy has been developed in consultation with the recognised Teacher Trade Unions. However some Teacher trade union representatives have confirmed that they do not agree with the full content of the Policy.

PURPOSE

This policy sets out the framework for a clear and consistent assessment of the overall performance of teachers, including the Headteacher, and for supporting their personal and professional development within the context of the school's plan for improving educational provision and performance, and the standards expected of teachers/headteachers.

The appraisal policy will be used to address any initial concerns that are raised about a teacher/headteacher's performance. Where additional support has been provided within the appraisal process and this does not lead to the required improvement, then consideration of whether to commence the capability procedure will be made.

APPLICATION

2.1 This policy applies to the Headteacher and all teachers employed by the school, except those on contracts of less than one term, those undergoing induction (i.e. Early Career Teachers) and those who are subject to the Capability Policy.

2.2 Separate arrangements exist for the appraisal of school support staff
https://schoolsportal.lancsngfl.ac.uk/sp_atoz/service.asp?u_id=3460&strSL=A

STATEMENT OF INTENT

3.1 Appraisal in this school will be a supportive and developmental process designed to ensure that all teachers/headteachers have the skills and support they need to carry out their role effectively. It will help to ensure that teachers/ headteachers are able to continue to improve their professional practice and to develop as teachers/headteachers.

3.2 The School Teachers Pay and Conditions Document states that "*Governing bodies and headteachers, in carrying out their duties, must have regard to the need for the headteacher and teachers at the school to be able to achieve a satisfactory balance between the time required to discharge their professional duties...and the time required to pursue their personal interests outside work*".

CONFIDENTIALITY STATEMENT

- 4.1 The School processes personal data collected under this policy in accordance with its data protection policy. 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, or the content of any discussions during appraisal meetings may be shared by the Headteacher/Appraiser with individuals involved in monitoring performance, or those involved in any capability proceedings that may follow and for quality assurance/moderation purposes. The Appraisee should be informed if documentation relating to their appraisal is shared.
- 4.3 Documentation arising from, or the content of 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.
- 4.4 Inappropriate access or disclosure of employee data constitutes a data breach and should be reported in accordance with the school's data protection policy. It may also constitute a disciplinary offence, which will be dealt with under the disciplinary procedure.

HEALTH & DISABILITY

- 5.1 The Appraiser should consider any ongoing health or disability affecting the Teacher/Headteacher during the appraisal cycle, including the possibility of considering whether any reasonable adjustments should be made. The Occupational Health Unit can provide advice in this respect if required.

GLOSSARY OF TERMS

Appraisee/ Teacher	Any reference to appraisee/teacher within this policy refers to the person being appraised, which may also include the Headteacher
Appraiser/ Reviewer	The person conducting the appraisal with the Teacher, which may also include the relevant committee of the Governing Board (in cases of Headteacher appraisal)
School day	One of the 195 days of the published school year when a teacher is required to be available for work under the School Teachers' Pay and Conditions Document.

THE APPRAISAL PERIOD

- 7.1 The appraisal period will run for 12 months, normally from 1 September to 31 August each year.
- 7.2 Teachers/Headteachers who are employed on a fixed term contract of less than one year should have their performance managed in accordance with the principles underpinning this policy. The length of the appraisal period will be determined by the duration of their contract.
- 7.3 Where a Teacher/Headteacher starts their employment at the school part-way through a cycle, the Headteacher or, in the case where the employee is the Headteacher, the Governing Board shall

determine the length of the first cycle for that Teacher/Headteacher, with a view to bringing their appraisal cycle into line with the cycle for other teachers as soon as possible.

7.4 Where a teacher/headteacher transfers to a new post within the school part-way through a cycle, the Headteacher or, in the case where the employee is the Headteacher, the Governing Board shall determine whether the cycle shall begin again and whether to change the Appraiser.

APPOINTING APPRAISERS

Headteachers

8.1 The Headteacher will be appraised by a committee of the Governing Board, who have been delegated to perform that function, supported by a suitably skilled and experienced external adviser who has been appointed by the Governing Board for that purpose.

8.2 In this school, the task of appraising the Headteacher, including the setting of objectives, will be delegated to a committee consisting of three members of the Governing Board. Schools of religious character or foundation schools should ensure that foundation governors are appropriately represented on the committee.

8.3 Where a headteacher is of the opinion that any of the governors appointed by the Governing Board is unsuitable to act as their Appraiser, they may submit a written request for that governor to be replaced, stating the reasons for the request.

Other teachers

8.4 The Headteacher will decide who will appraise other teachers. However, the Headteacher will carefully consider any representations from a teacher or appraiser in cases where they do not believe that the Appraiser/Teacher relationship is appropriate.

8.5 If it becomes apparent that the Appraiser appointed by the Headteacher will be absent for the majority of the appraisal cycle, the Headteacher may perform those duties or delegate those duties to another teacher for the duration of that absence.

8.6 If the Headteacher appoints an appraiser who is not the Teacher's line manager, the Appraiser to whom they delegate those duties will have an appropriate position in the staffing structure, together with the necessary background knowledge, skills and training to undertake the role.

8.7 Where a teacher is experiencing difficulties and the Headteacher is not the Appraiser, the Headteacher may undertake the role of appraiser.

SETTING OBJECTIVES

9.1 In schools, the Headteacher's objectives will be set by a committee of the Governing Board in consultation with the external adviser. 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 Teacher/Headteacher's role and level of experience.

9.2 The Appraiser and Teacher/Headteacher will seek to agree the objectives but, if that is not possible, the Appraiser 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 teachers with similar experience and levels of responsibility.

9.3 The objectives set for each teacher/headteacher will, if achieved, contribute to the school's plans for improving the school's educational provision and performance and improving the education of pupils at that school, and will include a description of what success may look like, where this is not obvious. The objectives may also take into account the professional aspirations of the Teacher.

9.4 The number and depth of objectives should be appropriate to the Teacher/Headteacher, their individual circumstances and role in school.

9.5 The process for monitoring progress against the objectives will be specific to each school. The monitoring that occurs may vary from school to school and will be dependent upon the role the Teacher has in school.

9.6 The appraisal process should include an assessment against the appropriate standards. Before, or as soon as practicable after, the start of each appraisal period, each teacher will be made aware of the standards against which their performance in that appraisal period will be assessed, in order that the Teacher can prepare for the appraisal meeting.

9.7 All teachers/headteachers should be assessed against appropriate standards contained in the DfE's "Teachers' Standards" (from September 2012), which the Teacher should be directed to. The Headteacher or Governing Board (as appropriate) will need to consider whether certain teachers should also be assessed against other sets of standards that are relevant to them e.g. LCC Post Threshold standards. Those paid on the Leadership Group Pay Range should also be assessed against the Headteacher Standards 2020. Qualified Teacher Learning and Skills (QTLS) holders may be assessed against the overarching professional standards for teachers in the lifelong learning sector, held by the Learning and Skills Improvement Service.

10. PAY PROGRESSION

10.1 Where teachers are eligible for pay progression, the recommendation made by the Appraiser will be based on the assessment of their performance against the appraisal objectives. The decision made by the relevant decision-making body will be based on the criteria outlined within the School's Pay Policy, the statutory criteria and guidance set out in the *School Teachers' Pay and Conditions Document (STPCD)* and the appropriate standards.

10.2 The Governing Board has agreed the pay policy of the school and has considered the implications of the Appraisal Policy with respect to the arrangements relating to teachers' pay in accordance with the STPCD. The Governing Board will ensure that decisions on pay progression are made by 31 December for Headteachers and by 31 October for other teachers.

10.3 Continued good performance as defined by the School Pay Policy should give a classroom or unqualified teacher an expectation of progression to the top of their respective pay range;

REVIEWING PERFORMANCE

11.1 There are a variety of ways to assess/gather evidence of the Teacher/ Headteacher's performance against the objectives set during the appraisal process. Classroom observation is also likely to form part of the review of performance for teachers with a classroom teaching role, as this can be an

effective way of assessing teachers' performance to identify any particular strengths and areas for development they may have. It is also a method of obtaining information which can inform school improvement more generally.

11.2 All observations under this policy will be carried out in a supportive fashion, with professionalism, integrity and courtesy, and should result in a professional dialogue and constructive feedback. Verbal feedback should be provided as soon as is reasonably practicable after the observation, normally within 3 school days and written feedback within 5 school days, unless circumstances make this impossible. Classroom observation will only be carried out by those with Qualified Teacher Status.

For the purposes of appraisal, teachers' performance will be monitored on an appropriate and reasonable number of occasions and will, as far as possible, be agreed by the Appraiser with the Appraisee based on the individual circumstances of the Teacher and the overall needs of the school.

11.4 In this school, teachers' performance will be regularly monitored by, for example:

Formal classroom observations

Headteacher "drop ins"

Book scrutiny

Pupil Progress meetings

Subject leader meetings

Pupil interviews

11.5 For the purpose of professional development, feedback on lesson observations should be developmental, and not only a judgement using Ofsted grades.

11.6 The school may use the findings of each observation, including appraisal observations, for other management requirements (for example subject area reviews), thereby seeking to minimise the total number of occasions when teachers are observed.

11.7 In addition to formal observation, Headteachers or other leaders with responsibility for teaching and learning standards may "drop in" in order to evaluate the standards of teaching and to check that high standards of professional performance are established and maintained. The length and frequency of "drop ins" and the notice to be given will vary depending on specific circumstances.

11.8 Schools should consider developing a classroom observation protocol/monitoring and evaluation schedule, which should provide details on the conduct of "drop in" and classroom observations. If such a protocol is developed, Headteachers should consult staff and school trade union/professional association representatives.

11.9 Teachers (including the Headteacher) who have responsibilities outside the classroom should also expect to have their performance of those responsibilities observed and assessed in an appropriate and relevant manner as part of the Appraisal Policy.

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

12. DEVELOPMENT AND SUPPORT

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

12.2 As part of the appraisal process, the impact of any continuing professional development on the Teacher's performance will be assessed.

12.3 The School CPD programme 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.

12.4 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:

the training and support will help the school achieve its priorities; and

the CPD identified is essential for an appraisee to meet their objectives.

12.5 During the annual assessment/review meetings, account will be taken of circumstances where it has not been possible for the Teacher/Headteacher to fully meet their objectives because any support recorded in the planning statement has not been provided, taking into account the reason why the support has not been provided.

FEEDBACK

13.1 Teachers/headteachers will receive constructive feedback on their performance throughout the year and soon after any observation has taken place or other evidence becomes available. Feedback will highlight particular areas of strength as well as any areas for further development.

13.2 The objectives set for each teacher/headteacher will, if achieved, contribute to the School's plans for improving the School's educational provision and performance and improving the education of pupils at that School. The monitoring of this will be specific to each School. The monitoring that occurs may vary from School to School and will be dependent upon the role the Teacher has in School.

TRANSITION TO CAPABILITY

14.1 If the Appraiser is not satisfied with progress made under the Appraisal Policy, the Teacher/Headteacher will be notified in writing by the Headteacher/Chair of Governors that:

the appraisal procedures will no longer apply

their performance will be managed under the Capability Policy – See Section 8 of the Model Capability Policy for Teachers in Delegated Schools

they will be invited to an informal capability meeting, with at least 5 school days' notice (A model letter to be used for this purpose is included within the Capability Policy)

the matter will then be referred to a member of the School Senior Leadership Team (if the Appraiser is not a member of the School SLT).

14.2 The informal and formal capability procedures are contained within a separate [Capability Policy](#).

ANNUAL ASSESSMENT

15.1 Each Teacher's performance will be formally assessed in respect of each appraisal period. In assessing the performance of the Headteacher, the Governing Board must consult the external adviser.

15.2 This assessment is the end point of the annual appraisal process, but performance and development priorities should be reviewed and addressed on a regular basis throughout the year. This may include interim meetings at the request of the appraiser or appraisee..Some performance objectives could be carried forward into the subsequent appraisal cycle.

15.3 The Teacher/Headteacher will receive a written Appraisal Report as soon as practicable following the end of each appraisal period, and have the opportunity to add comments. In this school, the Headteacher will receive their written appraisal report by 31 December each year and all other teachers will receive their written appraisal reports by 31 October, unless exceptional circumstances apply. The appraisal report will include:

details and evaluation of the Teacher/Headteacher's objectives for the appraisal period in question;
an assessment of the Teacher/Headteacher's performance of their role and responsibilities against their objectives and the relevant standards;
an assessment of the Teacher/Headteacher's future training and development needs and identification of any action that should be taken to address them;
a recommendation on pay where that is relevant (NB pay recommendations need to be made by 31 December for Headteachers and by 31 October for all other teachers);
performance objectives with success criteria for the next appraisal cycle
space for the Teacher/Headteacher to add their comments (if they wish).

15.4 The assessment of performance and of training and development needs will inform the planning process for the following appraisal period.

TEACHERS ON MATERNITY LEAVE DURING ALL/PART OF THE APPRAISAL CYCLE

16.1 Where a teacher is absent from school due to maternity leave, it is unlawful to deny them an appraisal and subsequent pay progression decision on the grounds of maternity. When a teacher returns to work from maternity leave, the school must give any pay increase that would have been received, following appraisal, had they not been on maternity leave.

16.2 Schools need to take a practical and flexible approach to conducting appraisals and making pay decisions for those absent on maternity leave, where a teacher has been absent for some or all of an appraisal cycle.

16.3 Schools should consider conducting an Appraisal Review prior to a teacher commencing a period of maternity leave, even if this is early in the appraisal cycle. This could assist the Reviewer in

making an appraisal and pay determination at the end of the Appraisal cycle, based on the evidence of performance to date in that appraisal year. The Reviewer could also take account of the Teacher's performance during previous appraisal periods if there is very little to go on in the current year. However, schools should not require teachers to use Keeping in Touch (KIT) days for the purposes of appraisal.

16.4 Schools may also consider conducting an Appraisal Review prior to a teacher commencing any other pre-planned long-term absence e.g. a period of extended unpaid leave, Adoption Leave, a planned long-term sickness absence.

MAYFIELD PRIMARY SCHOOL APPRAISAL POLICY FOR SUPPORT STAFF

Mayfield adopts the LCC Model Appraisal Policy (APRIL 2022)

The Governing Board of Mayfield Primary School adopted this policy in April 2022. The policy will be reviewed on an annual basis.

This policy has been developed in consultation with the relevant recognised Support Staff Trade Unions.

PURPOSE

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.

In addition to supporting the professional development of support staff, the appraisal procedure may be used to address any initial concerns that are raised about performance. If concerns are such that they cannot be resolved through this appraisal process, then consideration of whether to commence the [capability procedure](#) will be made.

APPLICATION

2.2 This policy applies to all employees in schools on former NJC terms and conditions of employment, 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 and Headteachers](#).

STATEMENT OF INTENT

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. It will help to ensure that employees are able to continue to improve their professional practice and to develop in their role.

3.2 Failure to meet any performance objectives as a result of absence or school closure arising from the Covid 19 pandemic will be viewed sympathetically and objectives will be adjusted accordingly.

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, or the content of any discussions during, appraisal meetings may be shared by the Headteacher/appraiser 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, or the content of 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.

HEALTH & DISABILITY

5.1 The appraiser should consider any ongoing health difficulty or disability affecting the employee during the appraisal period, including the possibility of considering whether any reasonable adjustments should be made. The Schools HR Team and/or Occupational Health Unit can provide advice in this respect if required.

GLOSSARY OF TERMS

Appraisee/employee	-	The person being appraised
Appraiser	-	The person conducting the appraisal

THE APPRAISAL PERIOD

7.1 The appraisal period will run for 12 months, normally from 1 September to 31 August each year. Pro rata adjustments will need to be applied for those employees on a temporary contract, those who take up a new post part way through the appraisal period or those who are due to commence a period of long-term absence before the end of the appraisal period (eg on Maternity/Adoption leave/planned sickness absence)

7.2 It will be a matter for individual schools to determine at what point during the appraisal period the appraisal meeting will take place although in order for the process to be as successful as possible it should be carried out early in the appraisal period.

7.3 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.

7.4 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 whether to change the appraiser.

APPOINTING APPRAISERS

8.1 The Headteacher will decide who will appraise each employee. The appraiser may be the Headteacher or the Headteacher may delegate some or all of this responsibility to other appropriate members of staff (eg the line manager of the employee where this is not the Headteacher).

8.2 If it becomes apparent that the appraiser appointed by the Headteacher will be absent for the majority of the appraisal period, the Headteacher may perform those duties her/himself or delegate those duties to another member of staff for the duration of that absence.

8.3 If the Headteacher appoints an appraiser who is not the employee's line manager, the appraiser to whom s/he delegates those duties will have an appropriate position in the staffing structure, together with the necessary background knowledge, skills and training to undertake the role.

8.4 Where an employee is experiencing difficulties and the Headteacher is not the appraiser, the Headteacher may undertake the role of appraiser.

SETTING OBJECTIVES

9.1 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.

9.2 The appraiser and appraisee will seek to agree the objectives but, if that is not possible, the appraiser 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.

9.3 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, where this is not obvious. The objectives may also take into account the professional aspirations of the employee and their current job description.

9.4 The number and depth of targets should be appropriate to the employee, their individual circumstances and role in school.

9.5 The process for monitoring progress against the objectives will be specific to each school. The monitoring that occurs may vary from school to school and will be dependent upon the role the employee has in school.

9.6 The appraisal process should include an assessment against each element of the employee's Job Description and a review of the Job Description to ensure it is still relevant.

10. PAY PROGRESSION

10.1 Where employees are eligible for pay progression this will be automatic from the 1st April following the appraisal meeting subject to Section 3 of the [SUPPORT STAFF PAY POLICY](#) which sets out the circumstances when increments may be withheld or advanced.

REVIEWING PERFORMANCE

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:

If the employee has continued to undertake all aspects of their role to a satisfactory standard;
If the employee has undertaken any additional training during the appraisal cycle;

If, with the benefit of hindsight, the objectives set at the start of the appraisal period were relevant and if there been any extenuating circumstances which means that certain objectives could not be met;

The role of the employee;

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.

11.2 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 appraiser will clearly outline the nature of the concerns, so that the employee is fully aware of what is required to achieve their objectives.

12. DEVELOPMENT AND SUPPORT

12.1 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.

12.3 The school CPD programme 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.

12.4 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:

the training and support will help the school achieve its priorities; and

the CPD identified is essential for an appraisee to meet their objectives.

ANNUAL APPRAISAL MEETING

13.1 The annual appraisal meeting will take place as early as possible in the appraisal period. The Headteacher/appraiser may wish to use the attached exemplar pro-forma (Appendix I) or devise their own in order to suit their school and/or a specific role.

13.2 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.

13.3 The employee will be provided with a copy of Appendix A and their Job Description along with a copy of the pro-forma from the last appraisal period (where possible). The appraisee will be asked to complete the relevant sections of the pro-forma and return to their appraiser prior to the appraisal meeting. Schools may wish to consider making the completion of the pro-forma in advance of the meeting optional and in some cases they may wish to provide some assistance in its completion. The

remainder of the pro-forma will be completed during the appraisal meeting. At the end of the meeting a fully signed copy should be provided to the employee and a copy should be retained by the appraiser for reference purposes at the next appraisal meeting and any interim appraisal meetings.

13.4 The assessment of performance and of training and development needs will inform the planning process for the following appraisal period.

EMPLOYEES ON MATERNITY LEAVE DURING ALL/PART OF THE APPRAISAL PERIOD

14.1 Where an employee is absent from school due to maternity leave, it is unlawful to deny her an appraisal on the grounds of her maternity.

14.2 Schools need to take a practical and flexible approach to conducting appraisals where an employee has been absent for some or all of an appraisal period.

14.3 Schools should consider conducting an interim appraisal meeting prior to an employee commencing a period of maternity leave, even if this is early in the appraisal year. Schools should not require employees to use Keeping in Touch (KIT) days for the purposes of appraisal.

14.4 Schools may also consider conducting an interim review meeting prior to an employee commencing any other pre-planned long-term absence e.g. a period of extended unpaid leave, Adoption Leave, a planned long-term sickness absence.