

## APPRAISAL FOR ASSOCIATE (NON-TEACHING) STAFF

*Last review: June 2017*

### Rationale

The appraisal of associate staff is intended to provide the following formal and regular opportunities:

- for associate staff to express their views of their roles and responsibilities to their line manager;
- to recognise good performance of associate staff;
- to contribute to the process of addressing poor performance of associate staff;
- for line managers to establish a shared understanding of what has to be achieved in their department and how this is to be accomplished;
- to work with associate staff to develop or refine the ways in which improvements should be undertaken and to identify contributions that associate staff could make;
- for line managers to consider, with their staff, professional development opportunities that should be considered for the post;
- to enhance the level of communication between line managers and associate staff;
- for associate staff to appreciate how they can and do contribute to whole school development and performance.

The intention is that the appraisal of associate staff will improve the performance of the relevant department and of individual members of associate staff. This does not imply that the outcome will be demands to work harder, rather that performance can be enhanced by working towards a shared goal with greater efficiency and improved morale.

While changes to pay may draw on the information gathered during the appraisal cycle, appraisal is not primarily linked to considerations of pay.

### The appraisal cycle

June/July Meeting (1) 30 minutes to 1 hour

In advance of this meeting, associate staff should be given a copy of their current job description and the summary of the appraisal record sheet (see next page) so that the member of staff has an opportunity to prepare for the meeting. The purpose of the meeting is as follows:

- To review the job description in light of changes during past year or expected in the following year;
- For the line manager to discuss general departmental or relevant whole school changes which will be or are expected to be taking place in the following year;
- For the line manager to discuss, often in general terms, their performance, including any areas in which this could be improved and the resources that are available to facilitate such an improvement.
- If improvements in performance are to be pursued, clear objectives should be drawn up describing the timescale, success criteria and resources. It is recognised that for some members of associate staff, setting performance objectives will be inappropriate and it is therefore not mandatory

March/April Meeting (2) 20 to 30 minutes

- Line manager and associate staff to discuss the progress of departmental or relevant whole school changes during the current academic year;
- Update concerning any changes to job descriptions established in meeting (1);
- Update concerning any performance related objectives and, where relevant, the professional development which is supporting the achievement of the objectives

NB The line manager has initial responsibility for taking the steps necessary for actions identified in either meeting to be progressed.

## Appraisal and Capability

Where there are concerns about the performance of a member of staff, the appraisal process may contribute to or trigger the implementation of the capability procedure.

## Documentation

The job description is a key document for associate staff. This should be considered by both the line manager and member of associate staff in advance of each meeting. Where changes to the job description are made, the updated description should be attached to the relevant appraisal meeting record sheet.

The record sheet for each meeting provides a mechanism for recording the matters arising. Three copies of the record sheet will exist, one for the member of associate staff, one for the line manager and one which is inserted into the member of staff's file.

The content of the record sheet for the associate staff appraisal meeting is as follows. A summary sheet, as shown below, is given to the member of staff in advance of the meeting so that they can prepare responses before the meeting.

	Yes	No
Has job description been reviewed? If changes are suggested, these should be put forward for consideration to the Headteacher Please give details		
Have changes affecting the department been discussed if applicable?		
During the past year, which parts of your job have you felt particularly pleased with and have given you the greatest satisfaction? Could these be used to better advantage by the school?		
Which aspects of your job have not gone as well as you would have hoped?		
Feedback by the Line Manager on performance since the last review		
Which other colleagues that you have closely worked with, can we approach in order to gather information about the job you do?		
What additional things could be done by the School eg Senior Management Team to improve your performance and effectiveness?		
What do you think should be your possible targets for the coming year? There should be at least two targets which should include reference to: Your job Professional development		
What hopes and aspirations do you have for your personal and professional future? What can be done in the next year and the longer term to develop your professional experience and add to your expertise? What might be done by the school to assist here?		

## Monitoring and Evaluation

The governing body and Headteacher will monitor the operation and effectiveness of the school's appraisal arrangements.

## Retention

The governing body and Headteacher will ensure that all written appraisal records are retained in a secure place for six years and then destroyed.

*Discussed by the Finance and Staffing Committee: 14 June 2017*

*Approved by full Governors: 12 July 2017*

*Date for next review: Autumn 2019*