

## **MODEL APPRAISAL POLICY FOR TEACHING STAFF IN WILTSHIRE SCHOOLS**

Consultations on this model policy have taken place in 2012 with following recognised teachers' unions: NAHT, ASCL, ATL, NUT, NASUWT. Full agreement to implement the 2012 model policy, has been reached with the recognised Head teachers' unions NAHT and ASCL and is endorsed by PHF and WASSH.

The views of ATL, NUT and NASUWT have been considered and taken into account by the LA. The 2012 appraisal policy is acceptable to the NUT, NASUWT and ATL.

The LA recommends this model for adoption in Wiltshire schools from 1<sup>st</sup> September 2013.

*In relation to revisions for 2013, the NAHT, NUT, ATL and NASUWT have not been able to fully agree with the pay policy recommended by Wiltshire Council and the points at issue were included as a preamble to that policy. This Appraisal policy makes a number of references to that Pay Policy and has been accepted by NAHT, NUT, ATL and NASUWT as a correct interpretation of the procedures that will need to be in place in order to accommodate the Wiltshire Model Pay Policy.*

**For  
adoption and implementation from 1<sup>st</sup> September 2013**

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## Introduction

- 1.1 From 1 September 2013 The School Teacher's Pay and Conditions Document states that performance appraisal for Classroom Teachers\*is directly linked to pay progression and builds upon the appraisal arrangements for teachers which came into effect from **1 September 2012**. These arrangements are set out in the Education (School Teachers' Appraisal) (England) Regulations 2012 (the Appraisal Regulations
- 1.2 The Appraisal Regulations set out the principles that will apply to teachers' in all maintained schools where they are employed for two Wiltshire terms or more.
- 1.4 Head teachers, or appraisers where this is delegated, will assess qualified teachers against the Teachers' Standards to a level that is consistent with what should reasonably be expected of a teacher in the relevant role and at the relevant stage of their career (whether a Newly-Qualified Teacher (NQT), mid-career teacher, or a more experienced practitioner). The professional judgment of Head teachers and appraisers will therefore be central to appraisal against these standards.
- 1.5 The Teachers' Standards will define the level of practice at which all qualified teacher are expected to perform at, or progress towards. It is proposed that teachers' performance will be assessed against the standards as part of the appraisal arrangements set out in this policy. *Toolkit 2a Teachers' standards 2012 mapped against the professional standards for teachers' QTS & Core 2007. Toolkit 2b interpretation of Teacher's standards September 2012.*
- 1.6 This model policy has been developed by Wiltshire Council and consultations on this model policy have taken place with following recognised teachers' unions: NAHT, ASCL, ATL, NUT, NASUWT.
- 1.7 The views of ATL, NUT and NASUWT have been considered and taken into account by the LA. The LA recommends this model for adoption by maintained schools to provide a consistency of approach to the appraisal of all teachers in Wiltshire schools. It is therefore recommended for adoption as the preferred framework for Wiltshire's maintained schools. It provides a minimum local appraisal framework within which Wiltshire schools should operate. The toolkits designed to accompany this policy contain more detailed guidance and templates.
- 1.8 This model policy is also recommended for adoption by those Academies who wish to align their approach to that recommended by the LA as the preferred design for Wiltshire.

## 2. Policy Statement

- 2.1 An effective appraisal process enhances the professional skills of teachers and is essential for continuous professional development. An effective appraisal process is also essential to the ongoing success of the school and in creating a shared vision of the purpose and aims of the school and ensuring that teaching staff understand how they contribute to these.

2.2 In accordance with the School Teachers Pay & Conditions 2013 all Classroom Teachers\* pay progression will be directly linked to performance. This appraisal policy should be read in conjunction with the schools pay policy when considering pay progression.

*\*Classroom Teacher means a qualified or unqualified teacher who is not a member of the Leadership group*

2.3 The arrangements for Leadership performance related pay has not changed.

2.4 This Appraisal Policy sets out the framework for a clear and consistent assessment of the overall performance of teachers, including the Head teacher, and for supporting their development within the context of the school's plan for improving educational provision and performance, and the standards expected of teachers. It also sets out the arrangements that will apply when teachers fall below the levels of competence that are expected of them.

### **3. Who does this policy apply to?**

3.1 This policy, as adopted by **Wilton and Barford CE VC Primary School** applies to the Head teacher and teaching staff of **Wilton and Barford CE VC Primary School**.

3.2 This policy, will be made known to all teaching staff and remain accessible to them within the school.

3.3 This policy applies to the Head teacher and to all teachers employed at the school unless they fall into one of the categories listed in paragraph 4 below.

### **4. When does the policy not apply?**

4.1 This policy does not apply in cases of alleged misconduct or unacceptable behaviour deemed to be willful or deliberate. If a teacher is capable of performing in their role but refuses to do so, the school's disciplinary policy and procedure should be followed.

4.3 This policy does not apply to Newly Qualified Teachers (NQTs) undergoing their formal induction period.

4.4 This policy will cease to apply to those teachers who have been made subject to formal capability proceedings as a result of this appraisal policy and procedure. Once a teacher or Head teacher's performance despite feedback is found at review to be unsatisfactory or very unsatisfactory (as detailed in section 16 and Toolkit 13) the procedure to be followed from that point is the formal stage of the school's capability policy.

### **5. Link to the school's capability policy and procedure**

5.1 The school's capability policy and procedure, where indicated at paragraph 15 in this policy, will therefore apply to those teachers (including the Head teacher) where serious concerns have been identified that this appraisal process has been unable to address. Formal capability proceedings should only be implemented where performance concerns have been identified and the teacher made aware of these and any corrective action taken has failed to bring about an improvement. See Toolkit 11 for further guidance.

- 5.2 The Schools HR Advisory team will offer advice to its client schools on the application of this policy. It is strongly recommended that Head teachers seek advice from a Schools HR Advisor as early as possible when performance concerns arise during the appraisal cycle. However, whenever action under the formal capability procedure is being considered, advice from a Schools HR Advisor (or the school's alternative HR provider) must be sought.

## **THE APPRAISAL PROCESS**

### **6. Introduction**

- 6.1 Appraisal in this school will be a supportive and developmental process designed to ensure that all teachers have the skills and support they need to carry out their role effectively. It is also intended to ensure that teachers are able to continue to improve their professional practice and to develop as teachers.
- 6.2 The appraisal process will link to the school's improvement plan, school self-evaluation and the wider schools improvement process. Objectives agreed as part of the appraisal process will be aligned with the school's priorities and plans, as well as reflecting teachers' professional aspirations.
- 6.3 In addition the appraisal process for Classroom Teachers\* with regard to Performance Related Pay will directly link to the Schools' Pay Policy.

#### **The appraisal period**

- 6.4 The appraisal period will run for twelve months from September 1<sup>st</sup> 2013 to August 31<sup>st</sup> 2014.
- 6.5 This policy does not normally apply to teachers on contracts of less than two Wiltshire terms.
- 6.6 Teachers who are employed on a fixed term contract of less than one year but more than 2 Wiltshire terms will have their performance managed in accordance with the principles underpinning this policy. The length of the period will be determined by the duration of their contract.
- 6.7 Where a teacher begins their employment with the school part way through a cycle, the Head teacher, or in the case where the teacher is the Head teacher, the Governing Body, shall determine the length of the first appraisal period for the teacher, with a view to bringing the appraisal period into line with the cycle for other teachers at the school as soon as possible.
- 6.8 Where a teacher transfers to a new post within the school part way through an appraisal cycle, the Head teacher, or in the case where the teacher is the Head teacher, the Governing Body, shall determine whether the appraisal period should begin again and whether a different reviewer is needed. The aim will be to bring the new appraisal period into line with the cycle for other teachers at the school as soon as possible.

### **7. Appointment of appraisers of the Head teacher**

- 7.1 The Head teacher of **Wilton and Barford CE VC Primary School** will be appraised by the Governing Body, supported by an external adviser who has been appointed by the Governing Body for that purpose.
- 7.2 At **Wilton and Barford CE VC Primary School** the task of appraising the Head teacher, including the setting of objectives, will be delegated to a sub-group consisting of three members of the Governing Body. The Chair of Governors will normally be a member of that sub-group and will lead in the setting of objectives for the Head teacher and appraising performance.

## **8. Appointment of appraisers of other teachers**

- 8.1 All appraisers of teachers, other than the Head teacher, will be qualified teachers. All appraisers will be suitably trained in the appraisal process. *Toolkit 3 Effective preparation & support of appraisers.*
- 8.2 The Head teacher will determine who will appraise other teachers. In the case where the Head teacher is the teachers' line manager they will undertake the appraisal. Where the Head teacher is not the direct line manager they may decide to delegate the appraiser responsibilities, in their entirety, to the teachers' own line manager.
- 8.3 Where teachers have an objection to the choice of appraiser, they can make an application to the Head teacher for an alternative but the Head teacher's decision is final.

## **9. The appraisal planning and review meeting**

- 9.1 The appraiser will arrange to meet with the teacher for a planning and review meeting at the start of the appraisal cycle to review the outcomes from the previous appraisal cycle and the plan for the forthcoming cycle. *Toolkit 4 flowchart of annual appraisal cycle.* The purpose of the meeting is to:
- Agree the objectives for the appraisal period;
  - Provide a copy of the teacher standards against which all performance will be judged;
  - Explain that performance is directly linked related to pay progression and explain the concept of Absolute\* performance criteria as set out in the schools pay policy.
  - Explain how performance will be reviewed, including arrangements for classroom observation and any other evidence which will be taken into account in assessing the teachers' performance;
  - Explain the performance criteria against which the teachers' performance in each of these areas will be assessed. This should include discussion of what successful achievement of the confirmed objectives would look like;
  - Agree the support which may be needed to enable the teacher to achieve the objectives set;
  - Set timescales for the achievement of objectives;
  - Identify the teachers' training and development needs and the actions that will be taken to address these;

- Carry out a review following the criteria outlined above and make a recommendation for pay progression.
- 9.2 The appraisal planning and review meeting should be a professional dialogue between the appraiser and the teacher.
- 9.3 In arranging the meeting, the appraiser should ensure that sufficient notice is provided to enable both the appraiser and the teacher to prepare. Regard should also be given to holding the meeting in a suitable location, away from potential interruptions or distractions.
- 9.4 Teachers should play an active part in the meeting making sure they put forward their own views about their performance and future development. *Toolkit 5 Standards self assessment form for appraisee.*
- 9.5 Where a teacher has started new employment at **Wilton and Barford CE VC Primary School** either before or during the school's normal appraisal cycle the Head teacher (or Governing Body where a Head teacher) shall determine whether the previous objectives are relevant to **Wilton and Barford CE VC Primary School**. Where the teachers' previous objectives are not relevant to **Wilton and Barford CE VC Primary School** priorities and plans, the Head teacher (or Governing Body where a Head teacher) shall set new objectives taking into account the period left in the cycle available for their achievement.

## **10. The appraisal planning and review record**

- 10.1 The appraisal planning and review record provides the detail of what was agreed at the planning and review meeting at the start of the next appraisal cycle. *Toolkit 6 Teacher Appraisal Record and Report.*
- 10.2 A copy of the record should be given to the Appraisee within five working days of the meeting. The record should be a fair summary of what took place at the meeting and should include a summary of all the points covered, any action agreed and set out the objectives for the forthcoming period. It should also identify any support needed and how this will be provided. The teacher should be given the opportunity to record comments. Any disagreement should be recorded but the Head teachers' decision is final. The record will also detail how performance will be measured and recommendations in relation to pay progression as detailed in the Schools' Pay Policy.
- 10.3 Once the record has been agreed and signed by both parties (including any additional comments) the appraiser will provide the teacher with a copy and pass the original to the Head teacher for retention. Where the Head teacher is the appraisee, the copy of the record will be passed to the Chair of Governors.

## **11. Setting objectives**

- 11.1 The Head teachers' objectives will be set by the Governing Body after consultation with the external adviser.
- 11.2 Teachers' objectives will be set by the Head teacher, where they are the direct line manager, or the line manager nominated by the Head teacher to carry out the appraisal.

- 11.3 Objectives for each teacher will be set before or as soon as practicable after, the start of each appraisal period. The objectives set for each teacher will be based on the SMART principles (Specific, Measurable, Achievable, Realistic and Time-bound), and will be appropriate to the teachers' role and level of experience. The appraiser and teacher 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. *Further guidance can be found in the 'setting objectives' toolkit 7.*
- 11.4 Judgements of performance will be made against the extent to which individual objectives, the relevant Teachers Standards have been met, and how the teacher has contributed to any specific impacts the school had documented in their pay policy, eg impact on pupil progress. Performance for Classroom Teachers\* will be directly linked to pay progression in accordance with **Absolute criteria\***
- 11.5 Before, or as soon as practicable after, the start of each appraisal period, each Classroom Teacher will be informed of the standards against which their performance in that appraisal period will be assessed. All teachers should be assessed against the set of standards contained in the "Teachers' Standards" document published in July 2011. The Head teacher or Governing Body (as appropriate) will need to consider whether certain Classroom Teachers should also be assessed against other sets of statutory standards published by the Secretary of State that are relevant to them.
- 11.6 **Wilton and Barford CE VC Primary School** believes in a clear and consistent approach to the overall performance of Classroom Teachers as set out in this policy.

## **12. Reviewing performance - observation**

- 12.1 **Wilton and Barford CE VC Primary School** believes that observation of classroom practice and other responsibilities is important both as a way of assessing teachers' performance in order to identify any particular strengths and areas for development they may have and of gaining useful information which can inform school improvement more generally. All observation will be carried out in a supportive manner and there must always be a clear rationale and focus for any classroom observation undertaken.
- 12.2 Within **Wilton and Barford CE VC Primary School** teachers' performance will be regularly observed but the amount and type of classroom observation will depend on the individual circumstances of the teacher and the overall needs of the school. Classroom observation will be carried out only by those with Qualified Teacher Status (QTS). In addition to formal observation, Head teachers or other leaders with responsibility for teaching 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 school will determine the use of "drop in" observations, such as length and frequency. *Further guidance can be found in the 'classroom observation' Toolkit 8.*

12.3 Teachers (including the Head teacher) who have responsibilities outside the classroom should also expect to have their performance of those responsibilities appraised and where relevant observed.

### **13. Development and support**

13.1 Appraisal is intended to be a supportive process which will be used to inform continuing professional development for all teachers and pay progression for all teachers. 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 and may take a number of forms, for example, coaching and mentoring, additional assistance in the classroom, or equipment.

### **14. Feedback**

14.1 Teachers will receive written constructive feedback on their performance throughout the year and five working days after observation has taken place or other evidence has come to light. Feedback will highlight particular areas of strength as well as any areas that need attention.

14.2 Performance and development priorities will be reviewed and addressed on a regular basis throughout the year in interim meetings between the appraiser and the teacher. The frequency of interim meetings is for individual schools to decide. However, good practice does state that a mid-year review should ideally happen in January/February. Discussions should be recorded and a copy provided to the appraisee for their records. *Toolkit 8 monitoring & support review form.*

### **15. Concerns regarding performance**

15.1 Where there are concerns about any aspects of the teachers' performance the appraiser will arrange to meet with the teacher and the Head teacher/member of the Senior Leadership Team. See *Toolkit 11 for further guidance*. If the concerns are with the Head teachers' performance, then a meeting needs to be arranged with the Chair of Governors. *Toolkit 12 – model letter 1*

The teacher will receive five working days notice of the meeting and will have the right to bring a trade union representative/work colleague. The purpose of this meeting is for the Head teacher/member of the Senior Leadership Team to formally:

- give clear feedback to the teacher about the nature and seriousness of the concerns;
- give the teacher the opportunity to comment and discuss the concerns;
- agree any support (e.g. coaching, mentoring, structured observations), that will be provided to help address those specific concerns;
- make clear how, and by when, the appraiser will review progress (it may be appropriate to revise objectives and modify support, and it will be necessary to allow sufficient time for improvement. The amount of

time is up to the school but should reflect the seriousness of the concerns);

- explain the implications and process if no – or insufficient – improvement is made.
- agree a supportive action plan incorporating these elements. *Toolkit 10 Supportive Action Plan*. Where appropriate to clearly identify where the teacher is not achieving the level of practice which is appropriate to the relevant stage of their career and as defined in the ‘Teachers’ Standards 2012’ document (a copy of which should be provided to them).
- Explain the potential implications relating to the impact of their performance on pay.

15.2 In discussion with the teacher, support will be identified to assist the teacher in addressing the issues raised. The nature of the shortcoming(s) will determine the nature of the help and support to be provided. This could include:

- Mentoring and/or coaching
- Provision of suitable training
- Management and/or peer support
- Structured observation
- Review of objectives
- Appropriate equipment / resources

15.3 The teacher must be supported for a period of time which is reasonable considering the post and the nature of the shortcoming(s); this would usually be no less than 4 weeks, but no more than 12 weeks. At least one informal feedback meeting will be held during this time as an indicator of progress and the teacher has the right to be accompanied by a trade union representative/work colleague at this meeting.

15.4 Following the meeting to discuss the performance concerns, the appraiser will confirm in writing the performance shortcoming(s), the performance standards required, the timeframe over which improvement will be expected, the support which will be put into place, the potential implications relating to the impact of their performance on pay and how improvement will be measured and monitored. *Toolkit 12 – Model letter 2*

#### Review Meeting under Appraisal Process

15.5 If after the period set under paragraph 15.3, when progress is reviewed, the appraiser is satisfied that the teacher has made, or is making, sufficient improvement, the appraisal process will continue as normal, with any remaining issues continuing to be addressed through the Appraisal Process. The teacher should be informed of this and also reminded of the need to maintain the improved standard. *Toolkit 12 – Model letter 3*

15.6 If after the period set under paragraph 15.3, when progress is reviewed no or insufficient improvement has been made, formal capability proceedings will commence. *Toolkit 12 – Model Letter*

15.7 The teacher will be invited to a meeting under the formal Capability Procedure and he/she maybe supported by a trade union representative or work colleague. The teacher will be given ten working days notice of the meeting  
Toolkit 12 - Model Letter 5 Invite to Formal Meeting Under Capability Procedure.

## **16 Transition to the formal capability procedure**

16.1 The capability procedure will only apply to those teachers and Head teachers about whose performance there are serious concerns that the appraisal process (set out in section 15 above) has been unable to address during the supportive review stage.

16.2 The stages of the Formal Capability Procedure can be found in Toolkit 13 Teachers' Capability Procedure flowchart.

## **17 Annual assessment**

17.1 Each teacher's performance will be formally assessed in respect of each appraisal period. In assessing the performance of the Head teacher, the Governing Body must consult with the external adviser as appointed by them under section 7 for that purpose. *Toolkit 6 Teacher Appraisal Record and Report.*

17.2 The teacher will receive within ten working days following the end of each appraisal period a written appraisal report. The teacher will also have the opportunity to comment in writing on their appraisal. At **Wilton and Barford CE VC Primary School** teachers will receive their written appraisal reports by 31 October (31 December for the Head teacher). The appraisal report will include:

- details of the teachers' objectives for the appraisal period in question;
- an assessment of the teachers' performance of their role and responsibilities against their objectives and the relevant standards;
- an assessment of the teachers' training and development needs and identification of any action that should be taken to address them;
- a recommendation on pay progression in line with the school's pay policy; (pay recommendations need to be made by 31 December for Head teachers and by 31 October for other teachers).

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

## **18 Appeals**

Refer to school's pay policy regarding pay progression and appeals

## **19. Monitoring and Evaluation**

19.1 The Governing Body will monitor the operation and outcomes of the school's appraisal arrangements.

19.2 The Head teacher will provide the Governing Body with a written report on the operation of the school's appraisal policy annually. The report will not contain any information that would enable any individual to be identified.

The report will include:

- the operation of the appraisal policy;
- the effectiveness of the school's appraisal procedures;
- teachers' training and development needs;
- pay recommendations and sufficient information to ensure Governors are able to make decisions;
- information to demonstrate decisions have been made fairly and objectively in compliance with agreed criteria.

19.3 The Governing Body of **Wilton and Barford CE VC Primary School** is committed to ensuring that the appraisal process is fair and non-discriminatory, and the following monitoring data should be included in the Head teacher's report *Toolkit 14 monitoring & evaluation* because it represents the possible grounds for unlawful discrimination:

- Race
- Sex
- Gender Re-assignment
- Marriage and Civil Partnership
- Sexual orientation
- Disability
- Religion or belief
- Age
- Part-time contracts
- Trade union membership

19.4 The Head teacher will also report on whether there have been any appeals or representations on an individual or collective basis on the grounds of alleged discrimination under any of the categories above.

## **20. Roles and responsibilities under this policy**

Head teacher and Governing Body responsibilities:

- The Head teacher and Governing Body of **Wilton and Barford CE VC Primary School** will be responsible for the management and implementation of this policy at their school.
- The Head teacher and Governing Body will develop clear arrangements for linking appraisal to pay progression in this policy and/or school's pay policy.

- The Head teacher and Governing Body will ensure that all appraisers involved in appraisal of teachers in Wilton and Barford CE VC Primary School are aware of their responsibilities under this policy.
- The Head teacher and Governing Body will ensure that all teachers are informed of the policy and that the teachers have the knowledge and are aware of their responsibilities under this policy.
- The Head teacher and Governing Body will ensure that all appraisers of teachers, other than the Head teacher, will be qualified teachers.
- The Governing Body will appoint an external advisor for the purpose of supporting them with the appraisal of the Head teacher.
- The Head teacher and Governing Body will support teachers' development within the context of the school's plan for improving educational provision and performance and to ensure that teachers understand the standards of performance expected of them.
- The Head teacher and Governing Body will ensure that written appraisal records are retained in a secure place for six years and then destroyed.
- The Head teacher will make recommendations to the Governing Body and ensure they have sufficient information including how the appraisal has been scored to enable Governors to make their decisions.
- The Head teacher/Governors will maintain records of decisions and recommendations made demonstrating that all decisions are made objectively and fairly in compliance with agreed criteria. . The outcome of pay decisions will be monitored including the extent to which different groups of teachers may progress at different rates and check that processes operate fairly.
- The Head teacher will report on high performing teachers and make recommendations for additional payments in line with agreed criteria and school's pay policy.
- Head teachers/Line Managers will keep teachers informed about the process and recommendations made throughout this process and decisions reached.
- Governing Bodies will agree the extent to which specific functions relating to pay determination and appeals processes will be delegated to others, including the head teacher.
- Governors will approve teachers' salaries including recommendations from the senior leadership team on whether to award performance pay in line with the School's Pay Policy.
- Governors will consider budgetary implications of pay decisions and consider these in the school's spending plan. The Governing Body will ensure there is sufficient monies available to support pay decisions and will not withhold progression due to budget reasons.

Teacher responsibilities:

- To play an active role in their own appraisal and professional development including taking actions agreed at appraisal meetings and to ensure they understand arrangements within the school appraisal and pay policy.
- Keep records of their objectives and review them throughout the appraisal period.
- Decide whether they wish to apply for access to the upper pay range and provide the appropriate evidence.
- Where the role of appraiser has been delegated to them, to act as an appraiser for other teachers.

### **Schools HR responsibilities:**

- The Schools HR Advisory Team, acting on behalf of the Local Authority, will be responsible for ensuring that this policy continues to reflect the statutory regulations and follows the principles of good practice.
- To provide a comprehensive toolkit to support the application of this county-wide policy and procedures as part of a statutory provision supported by the LA.
- For those schools that purchase the Schools HR Advisory service, the service will be able to advise and support Head teachers and Governors on the application of this policy and procedure. Where schools have alternative arrangements in place they should consult their own HR service provider.

## **21. Information for staff**

21.1 Frequently Asked Questions (FAQs) are available in toolkit 16 but copies of the policy and procedure may also be provided by the school / academy (where adopted) on request.

## **22. Related policies and other information**

A comprehensive toolkit is provided to client schools of the HR Advisory service to support this Model Appraisal Policy for teaching staff in Wiltshire schools:

Toolkit 1 – Teachers' Standards

Toolkit 2a – Teachers' Standards mapped against professional standards for teachers

Toolkit 2b – Interpretation of the Teachers Standards

Toolkit 3 – Effective Preparation & support of appraisers

Toolkit 3a – Setting Objectives

Toolkit 4 – Flowchart of annual appraisal process

Toolkit 5 – Standards Self Assessment Form for appraisee

Toolkit 6 – Teacher Appraisal Record and Report

Toolkit 7 – Classroom Observation

Toolkit 8 – Monitoring and Support Review Form

Toolkit 9 – Concerns regarding performance – an appraiser's guide

Toolkit 10 - Concerns regarding performance meeting – Model Agenda

Toolkit 11 – Supportive Action Plan  
Toolkit 12 – What to do where there are concerns regarding performance  
Toolkit 12 - Model Letter 1 – invite to concerns regarding performance meeting  
Toolkit 12 - Model Letter 2 – follow up from concerns regarding performance meeting  
Toolkit 12 - Model Letter 3 – outcome of concerns regarding performance  
Toolkit 12 - Model Letter 4 – invite to formal meeting  
Toolkit 13 – Capability procedure flowchart  
Toolkit 14 – Final appraisal report  
Toolkit 15 – Monitoring & Evaluation  
Toolkit 16 – FAQs  
Toolkit 17 - Guidance for Schools Performance Related Pay – weighting for teachers  
Toolkit 18 - Appraisal Management Cycle

See other HR policies referred to at 4.1 where these are more relevant to the issues raised including:

- Disciplinary Policy and Procedure
- Ill Health Policy and Procedure
- Schools Pay Policy
- Capability Policy and Procedure
- NQT Induction Process
- Maternity Compliance Guidance