

Trust Appraisal Policy



Approved by:	The Trust Board	Date: July 2021
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Recognised unions have been consulted on this document via the Unity Schools Partnership Joint Consultation and Negotiation Committee. It was accepted by Unity Schools Partnership on:	Date: July 2021
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DOCUMENT CONTROL

Changes History

Issue No	Date	Amended by	Summary of Changes
1.0	July 2015		Version 1.0
2.0	June 2017		Version 2.0
3.0	September 2020		Version 3.0
3.0	May 2021	Head of HR	<p>Removal of reference to pay policy throughout to reflect professional growth model in place. In addition, the reference to targets has been replaced with reference to objectives.</p> <p>Section 2; explanation of professional growth approach and purpose of coaching.</p> <p>Section 5: amended role of appraiser from responsible for setting objectives which is jointly done by the appraiser and appraisee in a professional growth model.</p> <p>Section 5: Where the trust deems it not appropriate or possible to change an appraiser, review meetings can be supported by HR and trade union representation.</p> <p>Section 6: removal of data target and reworded to reflect professional growth model in place.</p> <p>Section 6: addition of arbitration process if there is disagreement over targets.</p> <p>Section 6: clarification added on staff returning to work part way through the year.</p> <p>Addition of further advice section.</p>

Authorisation (Responsible Owner)

Name	Role	Approval Date
Tim Coulson	Chief Executive	July 2021

Approval (Accountable Owner)

Name	Role	Approval Date
Angela Bull	Head of HR	July 2021

Reviewers (Consulted)

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Executive Team Headteachers JCNC	July 2021

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1. Introduction

Unity Schools Partnership (“the Trust”) is a growing partnership of schools located in Suffolk, Essex, Cambridgeshire and the London Borough of Havering. Our model is about creating inter-dependence between our schools while each retains its own individual identity and character. All our schools however subscribe to a set of shared values, principles and operational processes that ensure quality education for all our young people.

2. Purpose

This policy, provides a framework for the clear and consistent approach to the development of our staff and our expectations in terms of the high standards to which all our staff aspire. The fundamental principles which underpin this approach, are the commitment to professional growth and professional trust where, unless evidence suggests otherwise, all staff are meeting the standards expected of them.

The approach we take to professional growth within our Trust is that we help all staff to become the very best version of themselves, supporting them to identify next steps and encourage them to grow professionally.

Professional Growth has several purposes;

- Build and enhance expertise and secure continuous growth and improvement
- Enable reflection on strengths and successes and areas for professional growth
- Recognise and promote a culture of professionalism

This approach is designed to change the way we view accountability and professional development and sets out the framework for a clear and consistent assessment of the overall performance of staff, and for supporting their development within the context of the Trust’s and School’s plan for improving educational provision and performance, and the standards expected of all staff.

The focus is on ‘getting better’ rather than being ‘good’ and the appraisal process is about improving not proving.

Effective, and genuinely continuous, professional growth...

- has a focus on improving student outcomes
- builds and enhances knowledge and expertise to bring about changes in practice
- has a narrow yet significant focus
- acknowledges that knowledge and expertise is domain specific
- recognises that novice and experts learn differently
- focuses on what works, challenges existing assumptions and is, therefore, evidence-informed
- involves collaboration with colleagues and peer support
- is sustained over time and includes frequent opportunities for learning, experimentation and practice, reflection and evaluation, honest frequent feedback and solutions-focused coaching.

The education of our pupils is our first concern, and we are accountable for achieving the highest possible standards in work and conduct.

Professional growth involves effective reflection in order to ensure our staff identify areas for further growth and continue to maintain the level of competence required for their role.

Coaching is a positive proactive activity that is part of professional development and personal growth. It is an opportunity for staff to develop themselves through a personalised approach by developing skills and self-awareness.

This policy also includes information on the arrangements that will apply when a member of staff falls below the levels of competence that are required of them.

3. Application of the policy

This policy applies to the all staff, with the exception of those:

- On contracts of less than one term;
- Undergoing induction (including NQTs) or probationary procedures. All new staff employed by the Trust, will be subject to a 26-week probationary procedure, as set out in the Trust's Probationary Procedure. This appraisal policy will only apply following successful completion of the NQT Induction or Probationary Procedure.
- Who are subject to formal capability procedures.

4. The appraisal period

Normally, the appraisal period will run for twelve months from 1 October to 30 September each year. A longer or shorter appraisal period may apply for appointments starting part way through the academic year.

A mid-year review of performance will normally be conducted around February/March each year. Members of staff who are employed on a fixed term contract of less than one year will 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.

5. Appointing appraisers

The setting of objectives is a joint activity between the appraiser and appraisee. The appraisee should take responsibility for their own professional growth and the appraiser will be responsible for reviewing performance and agreeing arrangements that support continued professional development.

The Headteacher will be appraised by the relevant Director for Education dependent on school phase; primary, secondary or special.

The Headteacher will be responsible for the appraisal of the Deputy Headteacher and other members of the school's Senior Leadership team. Appraisal of other Teachers and Support staff may be delegated to members of the school's Senior or Middle Leadership teams at the Headteacher's discretion.

Central team staff will be appraised by their line manager.

Should a member of staff feel that any person appointed as their appraiser is unsuitable for professional reasons, they may submit a request to the Headteacher (or the Chief Executive case of the Headteacher or central team staff) for that appraiser to be replaced, stating the reasons for their request. The Trust's Leadership will give reasonable consideration to any such request.

Where the Trust's view is that it is not appropriate (or possible) to change the appointed appraiser, its reasons will be explained in full and consideration given to other arrangements (for example, additional moderation of reviews or support during review meetings by HR and trade union representation) which aim to assure fair application of the appraisal process.

6. Setting objectives

A maximum of three objectives will be set in any appraisal period. If any work performance issues emerge during the appraisal period these will be addressed separately and without delay, normally as part of the ongoing professional dialogue between staff colleagues and their managers.

Objectives will:

- Be SMART (Specific, Measurable, Achievable, Realistic and Time-bound)
- Be well defined so that the appraisee and appraiser are clear what success looks like
- Become more challenging as staff progress in their experience.
- Be appropriate to the employee's role and level of experience, also considering their professional aspirations and an appropriate work life balance.

Objectives will include the following:

1. One about meeting the needs of pupils, and how staff are adapting their pedagogy and improving their knowledge to meet pupil needs and help them progress and should be within the staff member's ability to control the probability of success, and
2. One related to the development of teaching and learning/professional practice, using evidence-based strategies, and
3. One related to personal professional development, in the context of the school's / Trust's current improvement priorities.

For staff with roles not directly involved in the delivery of/supporting teaching and learning, some flexibility around points 1 and 2 above will be necessary, to ensure objectives reflect the core purpose of their role. However, objectives should always contribute to the school's/trust's improvement priorities, reflective practice and the Unity Schools Partnership objective of developing successful learners, confident individuals and responsible citizens.

Objectives will be set, following consultation with the individual, before, or as soon as practicable after, the start of each appraisal period. The appraiser and appraisee will seek to agree the objectives but, if that is not possible, the matter can be referred to an arbitrator to consider the matter. Every reasonable effort should be made to resolve any 'dispute' regarding objectives at an early stage, however the arbitrator will consider both parties views before reaching a determination which will be final. The arbitrator should seek advice from the Trust's HR team, to ensure consistency and moderation across the Trust. The arbitrator will be the Headteacher or for Headteachers the CEO. For central team this will be the Director or for Directors the Trust Board. Where the arbitrator determination is not accepted by either party, a note of this can be held on file.

Objectives may be revised if circumstances change.

For any staff returning to work part way through the year e.g. from maternity leave the objectives should be reviewed in light of the remaining appraisal year period and what can be reasonably achievable within that timeframe.

7. Relevant professional standards

Appraisers should ensure that all employees are clear about the standards and expectations against which they will be assessed as soon as practicable after the start of each appraisal period.

The expectation is that all Teachers are meeting the requirements of Teachers' Standards and all Support staff are meeting the competencies required to fulfill their job descriptions, unless areas of development need have previously been identified and discussed with them.

Reflective practice is an essential part continuous professional development for all staff, and self-evaluation is encouraged in all roles. Teaching staff should complete a self-evaluation against the Teachers' Standards (see Appendix 2) in anticipation of their annual review.

8. Observation

The Trust believes that observation of classroom practice and other responsibilities is important both as a way of assessing staff's performance in order to identify any particular strengths and areas for development they may have and of gaining useful information which will lead to the improvement in the quality of teaching and attainment of pupils.

Performance will be regularly observed. All observation will be carried out in a supportive fashion. The amount and type of observation will depend on the individual circumstances of the member of staff and the overall needs of the school/Trust. However, within the Appraisal process, it will not exceed three hours, spread over a maximum three observations.

The Headteacher, Directors of Education or others with responsibility for standards may conduct other observations, learning walks or "drop in" observations in order to evaluate the standards of teaching and learning across the school and to check that high standards of professional performance are established and maintained. The length and frequency of other observations, learning walks or "drop in" observations will vary depending on specific circumstances and they will not form part of the Appraisal process. They may however be used to inform ongoing professional dialogue between staff colleagues and their managers and assist the development of informal programmes of action, monitoring and support.

Classroom observations will be carried out by those with QTS, following the Classroom Observation Protocol in Appendix 1.

9. Other sources of information

Evidence from a range of sources will inform the overall assessment of performance set out in paragraph 11 of this policy.

As indicated in section 7 above, when assessing overall performance, the expectation is that all Teachers are meeting the requirements of Teachers' Standards and all Support staff are meeting the competencies required to fulfill their job descriptions, unless areas of development need have previously been identified and discussed with them.

Evidence we use to reflect on performance and development will not be solely based on pupil data or a small number of lesson observations. Staff should not be held accountable for data-driven objectives that no one individual can be solely accountable for. Instead the Trust is

committed to developing a professional culture which drives quality assurance from within; an enabling process rather than an imposed top down process.

Evidence may include:

- Feedback from formal lesson observations
- Reviews of schemes of work
- Reviews of children's work
- School reviews and Departmental reviews or reviews of extra-curriculum provision
- Moderation within and across schools
- Continuous Professional Development (CPD) records.

In the event that concerns are raised through Pupil or Parent Voice, these will be dealt with separately in accordance with the relevant policy/procedure.

10. Development and support

Appraisal is a supportive process which will be used to inform continuing professional development. The Trust expects all members of staff to take responsibility for improving their teaching and/or other work through appropriate professional development. Professional development will be linked to school/trust improvement priorities and the ongoing professional development needs/priorities of individual members of staff. In the case of competing demands on the school's/trust's budget for CPD, a decision on relative priority will be made considering the extent to which the CPD identified:

1. Is essential for the member of staff to meet their objectives, and
2. Will help the school/trust to achieve its priorities.
3. One objective related to personal development, in the context of the school's/trust's current improvement priorities

11. Reviewing performance

At the end of the appraisal period, an assessment of overall performance and a recommendation on pay progression will be made by the appraiser.

Mitigating circumstances: In the event that one or more objectives have not been fully met, due to circumstances outside the control of the individual or some other strongly mitigating factor, the appraiser may make a recommendation to either:

- Award pay progression (where relevant) or
- Extend the review period for a period not exceeding six working weeks. If the objective(s) are fully met at the end of the extended review period, any pay increment will be awarded and back-dated as appropriate.

This assessment is the end point to the annual appraisal process, but performance and development priorities will be reviewed and addressed on a regular basis throughout the year.

As indicated above, a mid-year review of performance will normally be conducted around February/March each year.

12. The Appraisal report

Each member of staff will receive a written appraisal report as soon as practicable following the end of each appraisal period and will have the opportunity to comment on it, in writing. The appraisal report will include:

- Details of the individual's objectives and whether or not they were met
- An assessment of the individual's overall performance (in particular, against the requirements of their job description/role, their objectives, progress in relation to agreed CPD, all relevant professional standards/expectations and, where relevant, teaching practice)
- An assessment of the individual's training and development needs and identification of any action that should be taken to address them. (This should inform the planning process for the following appraisal period)
- A recommendation on any pay progression.

The Appraisal report should not contain anything which has not previously been discussed between Appraiser and Appraisee. Arrangements for the consideration of pay recommendations and any appeal (including informal and formal stages) are described in the Trust's Pay Policy.

13. Feedback and dealing with any concerns about performance

All staff will receive constructive feedback on their performance throughout the year and as soon as practicable after any observation has taken place or any other evidence has come to light which requires discussion and/or action. Feedback will highlight areas of strength as well as next steps.

Where there are concerns about any aspects of the member of staff's work performance the individual's line manager or Headteacher / Director / Chief Executive will enter into an informal professional dialogue with the employee without delay, the purpose of which will be to:

- Give clear feedback to the member of staff about the nature and seriousness of the concerns
- Give the individual the opportunity to comment on 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 when progress will be reviewed.
- Make clear the school will expect significant and sustained improvement during the review period and explain the implications and process if no, or insufficient, improvement is made.

Although there is no right for the employee to be accompanied at this meeting, it may be helpful for the employee's Trades Union representative to give assistance. Advice from the Trust's HR Team should be sought prior to any meeting held.

Additional training, coaching or advice may be agreed and/or an informal programme of action, monitoring and support may be put in place (see template at Appendix 4)

When progress is reviewed, if the Line Manager/Headteacher/Director/Chief Executive is satisfied that the member of staff has made, or is making the required progress, no further action will be taken

If the Line Manager/Headteacher/Director/Chief Executive is not satisfied with progress within the time specified, an informal meeting will be held to review the evidence which has been collected. Advice from the HR Team should be sought prior to any meeting held.

Following the meeting, the individual will be notified in writing that their performance will be managed under the Trust's Capability procedure – advice from the Trust's HR team should be sought prior to any written notice being sent.

They will be invited to a formal capability meeting and procedures will be conducted as described in Trust's Capability Policy. At that point, performance management under this Appraisal policy will be suspended until the Capability issue has been resolved.

14. General principles underlying the Appraisal Policy

Confidentiality

The appraisal process will be treated with confidentiality. However, the desire for confidentiality does not override the need for the Headteacher and Trust to quality-assure the operation and effectiveness of the appraisal procedures/pay decisions and share necessary information with those involved in their administration.

Consistency of treatment and fairness

The Trust is committed to ensuring consistency of treatment and fairness. The Trust's commitments to acting in accordance with the principles of public life (objectivity, openness and accountability) apply equally to its arrangements for appraisal. The school will abide by all relevant equality legislation, including the duty to make reasonable adjustments for disabled staff. The Trust is aware of the guidance on the Equality Act issued by the Department for Education.

Definitions

Unless indicated otherwise, all references to "teacher" include the Headteacher.

15. Monitoring and Evaluation

The Trust will monitor the operation and effectiveness of the appraisal arrangements. The Chief Executive will provide the Trust Board with a written report on the operation of the Trust's appraisal policy, annually, including information on training and development needs and whether there have been any appeals or representations regarding appraisal procedures. The report will not contain any information which would enable any individual to be identified.

16. Retention

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

Further Advice

If any staff, contractor or visitor requires any further information regarding this policy or support they should either ask their Headteacher **or** contact the HR Helpdesk at hrhelpdesk@unitysp.co.uk or telephone 01440 333401.

APPENDIX 1 – CLASSROOM OBSERVATION PROTOCOL

The Trust is committed to ensuring that classroom observation is developmental and supportive and that those involved in the process:

- Carry out the role with professionalism, integrity and courtesy
- Evaluate objectively, acknowledging any particular circumstances which may affect performance on the day
- Report accurately and fairly
- Respect the confidentiality of the information gained.

The amount and type of classroom observation for the purpose of Appraisal will depend on the individual circumstances of the member of staff and the overall needs of the school / Trust, but will not normally exceed three hours spread over a maximum of three observations. In keeping with the commitment to supportive and developmental classroom observation those being observed will be notified not less than five working days in advance.

Wherever practicable, the arrangements for classroom observation will be included in the Appraisal plan and/or report. As appropriate, this will include the amount/duration of observation, its primary purpose, when during the appraisal cycle the observation will take place and who will conduct the observation. Although classroom observation will be undertaken in line with this plan, other information gathered during the observation will be used, as appropriate, for a variety of purposes including informing the school's self-evaluation and school / trust improvement strategies. This is consistent with the school's commitment to streamlining data collection and minimising bureaucracy and workload burdens on staff.

Where concerns about performance arise during the appraisal period it may be necessary to agree additional classroom observations which will be separate to the Appraisal process and will not be included in the evidence gathered for the annual Appraisal review.

Classroom observations will only be undertaken by those with QTS. In addition, classroom observation will only be undertaken by those who have been trained in classroom observation and in the provision of constructive and supportive feedback in the context of professional dialogue between colleagues. The Headteacher will seek to discharge their responsibility for monitoring the quality of teaching and learning primarily through the planned classroom observations. Observers will therefore be required to make a judgement about the quality of teaching and learning based upon advice in the school's Teaching and Learning Policy, in line with the framework adopted by the Trust. A support staff lesson observation framework is included in Appendix 3.

Verbal feedback will be given as soon as possible after the observation and normally within one working day of the observation taking place. It will be given during directed time, in a suitable, private environment. Written feedback will be provided within five working days of the observation taking place. If issues emerge from an observation that were not part of the focus of the observation as recorded in the appraisal plan these should also be covered in the written feedback and the appropriate action taken. No written notes in addition to the written feedback will be kept. The teacher may append written comments on the feedback document.

APPENDIX 2 - TEACHERS' STANDARDS SELF-EVALUATION

Please review these standards before your objective setting meeting. It should inform both the objectives that are set and any professional development that you may need and which should be discussed at the meeting.

This form is for your personal use only, although you may choose to share it with your Appraiser.

PART 1 – TEACHING	Self-evaluation			
1. SET HIGH EXPECTATIONS WHICH INSPIRE, MOTIVATE AND CHALLENGE STUDENTS	Weak	Developing	Embedded	Strength
1(a) establish a safe and stimulating environment for students, rooted in mutual respect				
1(b) set goals that stretch and challenge students of all backgrounds, abilities and dispositions				
1(c) demonstrate consistently the positive attitudes, values and behaviour which are expected of students				
2. PROMOTE GOOD PROGRESS AND OUTCOMES BY STUDENTS				
2(a) be accountable for students' attainment, progress and outcomes				
2(b) be aware of students' capabilities and their prior knowledge, and plan teaching to build on these				
2(c) guide students to reflect on the progress they have made and their emerging needs				
2(d) demonstrate knowledge and understanding of how students learn and how this impacts on teaching				
2(e) encourage students to take a responsible and conscientious attitude to their own work and study				
3. DEMONSTRATE GOOD SUBJECT AND CURRICULUM KNOWLEDGE				
3(a) have a secure knowledge of the relevant subject(s) and curriculum areas, foster and maintain students' interest in the subject, and address misunderstandings				
3(b) demonstrate a critical understanding of developments in the subject and curriculum areas, and promote the value of scholarship				
3(c) demonstrate an understanding of and take responsibility for promoting high standards of literacy, articulacy and the correct use of standard English, whatever the teacher's specialist subject				
3(d) if teaching early reading, demonstrate a clear understanding of systematic synthetic phonics				
3(e) if teaching early mathematics, demonstrate a clear understanding of appropriate teaching strategies				

4. PLAN AND TEACH WELL STRUCTURED LESSONS				
4(a) impart knowledge and develop understanding through effective use of lesson time				
4(b) promote a love of learning and children's intellectual curiosity				
4(c) set homework and plan other out-of-class activities to consolidate and extend the knowledge & understanding students have acquired				
4(d) reflect systematically on the effectiveness of lessons and approaches to teaching				
4(e) contribute to the design and provision of an engaging curriculum within the relevant subject area(s)				
5. ADAPT TEACHING TO RESPOND TO THE STRENGTHS AND NEEDS OF ALL STUDENTS				
5(a) know when and how to differentiate appropriately, using approaches which enable students to be taught effectively				
5(b) have a secure understanding of how a range of factors can inhibit students' ability to learn, and how best to overcome these				
5(c) demonstrate an awareness of the physical, social and intellectual development of children, and know how to adapt teaching to support students' education at different stages of development				
5(d) have a clear understanding of the needs of all students, including those with SEN; those of high ability; those with EAL; those with disabilities; and be able to use and evaluate distinctive teaching approaches to engage and support them.				
6. MAKE ACCURATE AND PRODUCTIVE USE OF ASSESSMENT				
6(a) know and understand how to assess the relevant subject and curriculum areas, including statutory assessment requirements				
6(b) make use of formative and summative assessment to secure students' progress				
6(c) use relevant data to monitor progress, set targets, and plan subsequent lessons				
6(d) give students regular feedback, both orally and through accurate marking, and encourage students to respond to the feedback				

APPENDIX 3 – HLTA / TA Standards and lesson observation framework

The following pages provide examples of the standards Higher Level Teaching Assistants and Teaching Assistants should seek to demonstrate during their work and in any lesson observation. They provide an 'at a glance' summary rather than an exhaustive list. The Professional Standards for HLTAs ([available here](#)) and the National Occupational Standards for Supporting Teaching Learning ([available here](#)) may also be referred to when considering continuous professional development, in particular in relation to expectations for working reflectively and collaboratively with colleagues, parents, carers and other agencies, as appropriate to the role.

	Supervision and support	Establishing good relationships	Managing pupil behaviour	Contribution to Teaching	Support for ICT, literacy and numeracy
1 – Entry level Teaching Assistant	Supervise and support pupils ensuring their safety and access to learning, alerting the teacher to where help is needed. Promote the inclusion of all pupils	Establish good relationships with pupils, acting as a role model and responding appropriately to individual needs	Support the teacher in managing pupil behaviour, reporting difficulties as appropriate. Encourage pupils to interact with others and engage in activities led by the teacher. Encourage pupils to act independently	Support pupils to understand instruction and inform teacher when students have difficulty	Support pupils' literacy, numeracy, ICT as directed by the teacher
2 – Established Teaching Assistant	Supervise and provide particular support for pupils, including those with special needs, ensuring their safety and access to learning activities. Promote the inclusion of all pupils	Establish constructive relationships with pupils and interact with them according to their individual needs.	Set high expectations and promote pupils' self-esteem and independence. Encourage pupils to interact with others and engage in activities led by the teacher. Promote good pupil behaviour and encourage them to take responsibility for their behaviour	Undertake structured and agreed learning activities/teaching programmes, adjusting activities according to pupil responses. Use strategies, in liaison with the teacher, to support pupils to achieve learning goals. Inform the teacher of students' misconceptions	Support the use of ICT, literacy and numeracy in learning activities and develop pupils' competence and independence in their use
3 – Aspiring HLTA	Use specialist skills/training and experience to support pupils, including those with special needs. Establish productive working relationships with pupils, acting as a role model and setting high expectations. Promote the inclusion of all pupils	Establish productive working relationships with pupils, acting as a role model in the way you communicate and show enthusiasm, setting high expectations	Set challenging expectations, promote positive values, attitudes. Apply the behaviour policy to promote good pupil behaviour; Encourage pupils to take responsibility for their behaviour and to interact and work co-operatively with others. Engage all pupils in activities. Employ strategies to reward self reliance	Implement agreed learning activities, adjusting activities according to pupil needs. Help pupils to access learning activities through using your specialist knowledge and skill Challenge pupils to think hard and be productive	Support the use of ICT, literacy and numeracy, in learning activities and develop pupils' competence and independence in their use Extend students' vocabulary and oracy, especially technical language
4 – HLTA	Use detailed knowledge and specialist skills to support pupils' learning. Support pupils consistently whilst recognising and responding to their individual needs. Promote the inclusion of all pupils.	Establish productive working relationships with pupils, acting as a role model in the way you communicate and show positive attitudes to learning, setting high expectations	Set challenging expectations, promote positive values, attitudes and excellent pupil behaviour. Apply the discipline policy to manage behaviour constructively, promoting self-control and independence. Enable pupils to interact and	Deliver learning activities to pupils within agreed system of supervision, adjusting activities according to pupil responses/needs, using your specialist knowledge and skill Challenge pupils to think hard and be productive	Promote literacy and numeracy improvement. Use ICT effectively to support learning activities and develop pupils' competence and independence in its use.

			work co-operatively with others engaging in activities. Employ strategies to recognise and reward achievement, self reliance and eagerness to learn.		Extend students' vocabulary and oracy, especially technical language
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Post Observation Discussion					
	Preparation and Planning			Contribution to Assessment	
1 – Entry level Teaching Assistant	Prepare classroom as directed for lessons and clear afterwards. Prepare and maintain equipment/resources as directed by the teacher and assist pupils in their use. Contribute to maintaining displays to support learning Be clear about your expected role in the lesson			Observe and spot pupil problems, note progress/achievements and feed back to the teacher as agreed. Keep a record as requested	
2 – Established Teaching Assistant	Assist with the planning of learning activities; Prepare, maintain and use basic equipment/resources required to meet the lesson plans and assist pupils in their use. Help to maintain a purposeful, orderly and supportive environment. Assist with the implementation of IEPs/BPs. Contribute to planning, setting up and maintaining displays to support learning Be clear of the lesson objectives and your role in achieving them			Monitor pupils' responses to learning activities and accurately record achievement/progress as directed. Provide detailed and regular feedback to the teacher on pupils' response.	
3 – Aspiring HLTA	Work with the teacher to establish an appropriate learning environment. Plan and produce motivational and informative displays. Work with the teacher in lesson planning, evaluating and adjusting lessons/work plans as appropriate. Help to set a working environment Assist with the implementation of IEPs/BPs Be prepared to contribute to achieving the lesson objectives			Provide feedback to pupils in relation to progress and achievement. Monitor and evaluate pupils' responses to learning activities through observation and recording of achievement against learning objectives. Undertake correcting of pupils' work, such as grammar and spelling; accurately record achievement/progress	
4 – HLTA	Organise and manage appropriate learning environment and resources, including displays that compellingly promote learning in the subject. Within an agreed system of supervision, plan challenging teaching and learning objectives appropriate and strategies for achieving them Implement IEPs/BPs			Provide feedback to pupils in relation to progress and achievement. Monitor and evaluate pupil responses to learning activities through a range of assessment and monitoring strategies against pre-determined learning objectives. Provide objective, accurate feedback on pupil achievement and progress. Correct their written work, for example spelling and grammar Record progress and achievement in activities systematically	

	Select and prepare resources necessary to lead learning activities, taking account of pupils' interests and language and cultural backgrounds	
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APPENDIX 4 - Template for weekly review meetings (under normal performance management)

Start date for review meetings:		Employee's name:		Line Manager's name:	
Date of reviews:		Signed:		Signed:	

Area(s) for improvement	Action needed	Actions and/or support agreed (with dates)	Notes regarding progress at each weekly review
<p><i>Detail the specific aspects of performance where improvement is sought.</i></p> <p><i>It may be helpful to reference aspects of the employee's job description, their professional duties or the relevant Teachers' Standards contained in the School Teachers Pay and Conditions Document</i></p>	<p><i>Detail the objectives and/or standards the individual must meet to demonstrate improvements in this area, and the consequences if standards are not achieved</i></p>		<p><i>Detail progress achieved by each review meeting, dating each update</i></p>
<p><i>Add further lines of detail as necessary</i></p>			