

St Bede's Inter-Church School



Teacher Appraisal Guidance and Templates

Approved by the Board of Directors: November 2023

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Introduction

Appraisal is a thorough yet supportive and developmental process designed to ensure that all teachers have the skills and support they need to carry out their roles effectively. It helps to ensure that teachers are able to continue to improve their professional practice and to develop as teachers. If done well all staff should be better able to help students achieve their potential (directly or indirectly), as well as gaining personal job satisfaction and progressing in their careers.

Appraisal applies to all teachers (where they are employed for one term or more) unless they are undergoing induction or the subject of capability procedures. Appraisal should not be confused with capability. Capability only applies to teachers about whose performance there are serious concerns that the appraisal process has been unable to address.

Below are some of the key points related to the teacher appraisal process:

- Under [The Education \(School Teachers' Appraisal\) \(England\) Regulations 2012](#), all teachers must have an annual appraisal
- St Bede's has published a written appraisal policy for their teachers (including the head teacher)
- Teachers' performance will be assessed every year primarily against the National Standards for Teachers.
- Objectives set must contribute to improving the education of students
- The three hour limit on classroom observation (for performance management purposes) no longer exists
- Teachers must be given a written appraisal report which sets out, an assessment of their performance, an assessment of their training and development needs and where relevant, a recommendation on pay progression (see exemplar template)
- Governing bodies must appoint an external adviser to advise them with appraising the headteacher
- As part of the change to Ofsted inspections from September 2012, schools if asked will have to provide anonymised appraisal information to inspectors for them to see if the process is effectively used in the drive for school improvement

The governing body has a duty to ensure the performance of teachers at its school is managed and reviewed in accordance with school policy and current Government regulations. The governing body should also review the policy annually.

The head teacher is responsible for the appraisal of teachers but may delegate this duty to other appropriate teachers, usually those with management responsibilities. The head teacher is also responsible for producing an annual report to governors about the operation of the appraisal policy, the effectiveness of the procedures and the teachers training and development needs.

With regard to appraisals there are three key partners:

- the employee/appraisee - who should fully participate in the appraisal process, seek feedback and act upon it
- the manager/appraiser - whose role is to guide and support, give feedback and help set development objectives which should improve the performance of the employee
- the school - which should provide a system for employee development, a structure which affords opportunities and a culture which supports the success of individuals

A truly valuable appraisal is actually an agreed summary of what has been happening since the last appraisal and what both the employee and the appraiser wish to be the case by the time of the next appraisal, linked to the school priorities, relevant standards and job role/career progression.

Time will be given to talk about previously agreed objectives, and how well these have been met, and to explore and agree appropriate objectives for the next period, together with any development needs arising. As such, the appraisal process requires thorough preparation on the part of both appraiser and appraisee. Both need to be aware of statutory regulations, teacher standards and the school's agreed appraisal policy. The appraiser also needs to have been appropriately trained and have the necessary skills and knowledge concerning the appraisal process to carry out the appraisal in addition to being sensitive to, and address, any doubts, fears or anxieties that the appraisee may have before the full appraisal discussion is broached. Wherever possible, the appraisal will be carried out by the teacher's immediate manager, as they are the person most likely to have the greatest knowledge of the teacher's performance and the requirements of their role.

All staff should have a copy of their current job description, which should be used as the starting point for any appraisal process. It is good practice to review job descriptions annually so that it properly reflects what the post holder is expected to do. If it is inaccurate this should be revised.

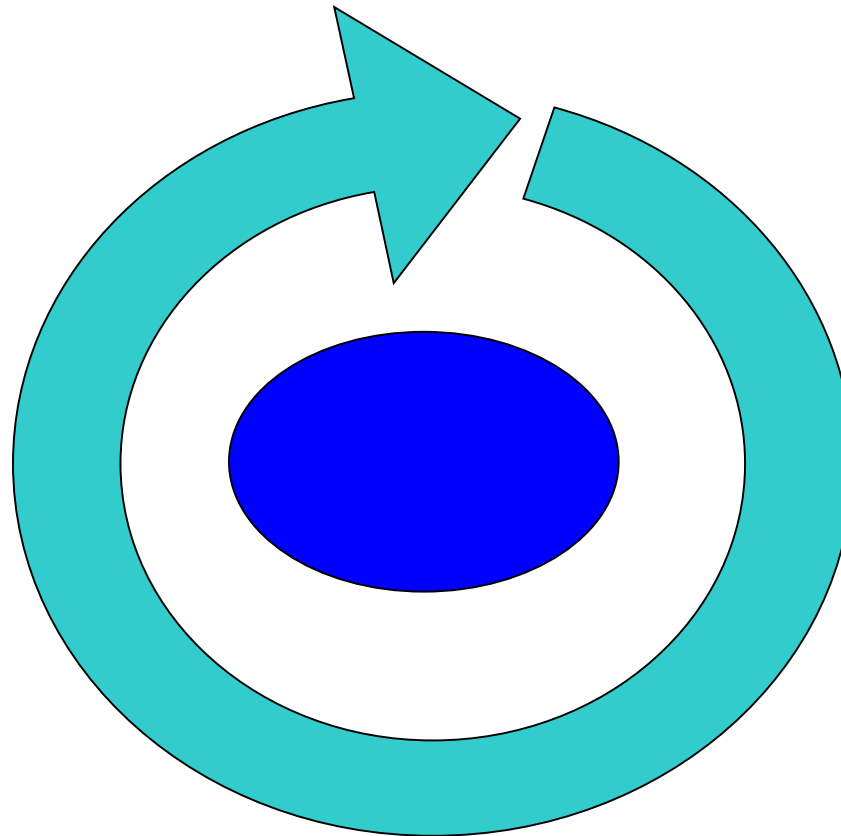
The Appraisal Process

The annual appraisal assessment/ review meeting

End of previous cycle progress, assessing achievements and pay decisions (where applicable)

The planning meeting

Agreeing new objectives, assess against standards, agree evidence/ success criteria, work development plans and CPD



Monitor and review progress throughout the year to maintain professional dialogue.

Appraisal Steps

Step 1: The arrangements

Appraisals should be conducted in a setting that ensures privacy and allows sufficient time for a thorough discussion.

Step 2: Preparation before the annual appraisal assessment/review and or planning meeting

The appraisal pre-meeting forms (copies attached) should form the basis of the discussion between the appraiser and the appraisee together with the job description. This will include:

- successes/achievements over the last review period
- progress towards objectives using appropriate evidence
- performance against teacher standards
- any factors which have impacted on effectiveness including training/development over the last year
- review of current job description
- identification of future key areas for objectives linked to job role and experience
- future training and development needs
- any career goals/aspirations

Step 3: Completing the review/planning meeting

- **Review of objectives and performance** – note key accomplishments and factors that have hindered or helped achievements
- **Employee development** – discuss the developmental progress since the last review and the training development opportunities that have occurred, its impact and future needs
- **Teacher standards** – for the review teachers are assessed against the relevant teacher standards (as identified at the planning meeting). For new appraisal cycle either teachers agree the standards against which they will be assessed or that need developing (refer to policy) as part of new objectives (template attached to support self-review of teacher in advance)
- **Objective setting** – as part of the formal appraisal the appraiser and the appraisee will agree new/continuing objectives for the next review period linked to school priorities, job role and experience. These should be agreed and clearly defined so transparency about what success will look like, how progress will be measured and the evidence that will be used including classroom observations. These are completed on the school appraisal statement template (example copy attached). Please note appraisers who conduct teaching observations of teaching must have QTS
- **Additional notes/ comments** - any other actions arising, including, where appropriate actions by the manager/appraiser to support appraisee
- **CPD/training and development needs** – should be jointly identified and noted on the appraisal statement

Setting Performance Objectives

Objectives agreed as part of the appraisal meeting, need to be appropriately challenging, brief, easily understood and linked to improving the progress and well-being of students at the school i.e. SMART. During the appraisal cycle both parties have a responsibility to ensure that what is agreed, is delivered and that there is ongoing professional dialogue throughout the year.

SMART objectives are:

- **Specific** be precise about what is going to be achieved?
- **Measurable** what evidence, data will you use and what impact will it have?
- **Achievable** are you attempting too much?
- **Realistic** have you identified the support you will need?
- **Time bound** is there a clear date for completion?

Professional development and training (CPD)

Enabling staff to develop to their full potential is a core part of the appraisal process and embraces a wide range of approaches Professional development should be linked to school improvement priorities and to the ongoing professional development of individuals, relevant to job role and experience. The school encourages all teachers to take responsibility for improving their teaching through appropriate professional development. Many opportunities for training can be sought within school and do not necessarily entail going on a course.

Step 4: After the review/planning meeting - completion of the documentation

The appraiser should complete an appraisal statement and submit to the appraisee for them to sign/comment. The appraisee should sign and return to the appraiser ASAP. Appraisal reports should include:

- details of the teacher's objectives
- assessment of the teacher's performance, their role and responsibilities against the objectives and relevant standards
- assessment of teacher's training and development taken to address them
- a recommendation for pay where relevant

Once signed the appraiser should pass a copy on to the head teacher, together with any training needs. The appraiser and appraisee should each retain a signed copy of the completed appraisal statement form and the CPD form. All documentation will be confidential and kept for a minimum of 6 years in the school.

Monitoring - key functions

The appraiser will monitor the appraisee's performance through different methods including:

- classroom observations
- task observations for other standards
- work scrutiny e.g. marking, assessments
- discussions with the appraisee/discussions with colleagues

Evidence from monitoring should always be shared with the appraisee during the year, so that there are 'no surprises' at the end of the cycle i.e. there should be ongoing professional dialogue.

Mid-year review

- To check on progress against the agreed objectives
- To check overall performance against the role and relevant professional standards
- To ensure that development and support opportunities necessary to meet the performance/success criteria are provided
- To discuss any issues arising during the year
- To collect evidence in support of the final annual assessment/review, which may form part of a Professional Development Portfolio

There may be occasions when it is necessary to review what has been agreed in the appraisal statement during the cycle. For example, where the appraisee's post and/or responsibilities have changed or if there have been difficulties in accessing agreed support or where the appraisee has been on maternity or long-term sickness absence. Where this is the case with the agreement of both parties, the objectives should be changed.

Feedback

Feedback is a two way process and where constructive forms an essential element of appraisal and ongoing professional dialogue. Feedback can be defined as:

- motivational feedback - identifies what is working well and has a positive impact in order to encourage continued high performance and positive behaviour
- developmental feedback - highlights performance and behaviours, which have a negative impact, and encourages change

The focus should be on facts and not personality. This ensures that feedback is specific, is understood, that examples are given and clarification provided if necessary. This enables the appraiser and the appraisee to communicate in a positive, open way and that trust is developed. It is useful therefore if both the appraiser and the appraisee consider areas that have gone well in addition to challenges that have been faced before the meeting and make a note on the pre-review meeting form (see attached). Feedback should also be ongoing and not just confined to formal review. Combined with other management skills, it supports the resolution of performance problems in a timely and effective manner.

Addressing Poor Performance

The process the school will follow needs to be clear in the appraisal policy. In short where concerns are raised there should be the opportunity to put in place robust objectives with identified support for the employee to achieve as part of the appraisal process. The purpose is to create a course of action that will assist the employee in correcting the performance issue(s). A written document should be produced that outlines the performance issues(s), identifies next steps, support and/or training, states a reasonable timeframe for demonstrating improvement, and describes the consequences for successful or unsuccessful completion. If the appraiser is satisfied that the teacher has made or is making sufficient progress, appraisal will continue with remaining issues being addressed through appraisal. If after the set time sufficient progress has not been, the school has a clear process in place to move from appraisal to capability. The teacher should be notified in writing that the appraisal system will no longer apply and performance will be managed under the capability process.

Confidentiality

The whole appraisal and the statements/evidence generated under it should be treated with strict confidentiality. The school will retain the written appraisal report for a minimum period of 6 years.

General Diversity

Appraisers must ensure that in the conduct of the appraisal process e.g. objective setting, performance review and development planning that the following are considered.

- Fairness: need to be aware of the potential for unconscious discrimination and to avoid assumptions about individuals based on stereotypes
- Consistency: all staff will receive the same entitlements. This will be continuously monitored through regular and routine quality assurance
- Equality: all staff should be encouraged and supported to achieve their potential through agreeing objectives, undertaking development and having their performance assessed
- Compliance with all the requirements of equalities legislation
- A clear timetable for the appraisal progress

Pre-Appraisal Meeting Template - Teacher Self Review

This can be used as an aide memoire to help you prepare for your appraisal meeting. It should be used as appropriate for you, i.e. all areas may not be relevant. You should also self-review against the teacher standards (see additional template overleaf).

What have your successes been over the past year in relation to the following (as appropriate to your role and objectives set)	Notes/Evidence/Dates
Students? <ul style="list-style-type: none"> • standards/attainment • progress • behaviour /attitude • contributions 	
Curriculum development? <ul style="list-style-type: none"> • developed / improved resources • increased personal knowledge • use of assessment procedures • contribution to wider curriculum e.g. clubs 	
Support for wider aspects of school life? <ul style="list-style-type: none"> • more efficient systems/processes introduced - contributed to policy development • member of a working/project group? 	
Support for other staff/team members and impact? <ul style="list-style-type: none"> • shared new knowledge or skills • mentored/coached a colleagues 	
Impact of learning or development opportunities over the year? <ul style="list-style-type: none"> • professional learning courses/networks/events • shadowing colleagues • peer reviews • learning from observation • reading /internet research 	

Teachers' Standards – Self Review Template

This should be used in advance of the appraisal meeting to identify standards already meeting and areas for development. Where there are development needs this should form part of the discussion at appraisal and incorporated into the objectives, evidence/success criteria, training and support agreed. We recommend that this is used year on year (rather than starting a new one each year) unless an individual's job changes significantly. A copy of the teaching standards can be obtained from the DfE: www.education.gov.uk.

Part one: Teaching

Teachers make the education of their pupils their first concern, and are accountable for achieving the highest possible standards in work and conduct. Teachers act with honesty and integrity; have strong subject knowledge, keep their knowledge and skills as teachers up-to-date and are self-critical; forge positive professional relationships; and work with parents in the best interests of their pupils.

A teacher must:	Exemplification	Standard met?	Evidence/ Dates
1. Set high expectations which inspire, motivate and challenge pupils	<ul style="list-style-type: none"> • establish a safe and stimulating environment for pupils, rooted in mutual respect • set goals that stretch and challenge pupils of all backgrounds, abilities and dispositions • demonstrate consistently the positive attitudes, values and behaviour which are expected of pupils. 		
2. Promote good progress and outcomes by pupils	<ul style="list-style-type: none"> • be accountable for pupils' attainment, progress and outcomes • be aware of pupils' capabilities and their prior knowledge, and plan teaching to build on these • guide pupils to reflect on the progress they have made and their emerging needs • demonstrate knowledge and understanding of how pupils learn and how this impacts on teaching • encourage pupils to take a responsible and conscientious attitude to their own work and study. 		

A teacher must:	Exemplification	Standard met?	Evidence/ Dates
3. Demonstrate good subject and curriculum knowledge	<ul style="list-style-type: none"> • have a secure knowledge of the relevant subject(s) and curriculum areas, foster and maintain pupils' interest in the subject, and address misunderstandings • demonstrate a critical understanding of developments in the subject and curriculum areas, and promote the value of scholarship • 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 • if teaching early reading, demonstrate a clear understanding of systematic synthetic phonics • if teaching early mathematics, demonstrate a clear understanding of appropriate teaching strategies. 		
4. Plan and teach well structured lessons	<ul style="list-style-type: none"> • impart knowledge and develop understanding through effective use of lesson time • promote a love of learning and children's intellectual curiosity • set homework and plan other out-of-class activities to consolidate and extend the knowledge and understanding pupils have acquired • reflect systematically on the effectiveness of lessons and approaches to teaching • contribute to the design and provision of an engaging curriculum within the relevant subject area(s). 		

A teacher must:	Exemplification	Standard met?	Evidence/ Dates
5. Adapt teaching to respond to the strengths and needs of all pupils	<ul style="list-style-type: none"> • know when and how to differentiate appropriately, using approaches which enable pupils to be taught effectively • have a secure understanding of how a range of factors can inhibit pupils' ability to learn, and how best to overcome these • demonstrate an awareness of the physical, social and intellectual development of children, and know how to adapt teaching to support pupils' education at different stages of development • have a clear understanding of the needs of all pupils, including those with special educational needs; those of high ability; those with English as an additional language; 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	<ul style="list-style-type: none"> • know and understand how to assess the relevant subject and curriculum areas, including statutory assessment requirements • make use of formative and summative assessment to secure pupils' progress • use relevant data to monitor progress, set targets, and plan subsequent lessons • give pupils regular feedback, both orally and through accurate marking, and encourage pupils to respond to the feedback. 		

A teacher must:	Exemplification	Standard met?	Evidence/ Dates
7. Manage behaviour effectively to ensure a good and safe learning environment	<ul style="list-style-type: none"> • have clear rules and routines for behaviour in classrooms, and take responsibility for promoting good and courteous behaviour both in classrooms and around the school, in accordance with the school's behaviour policy • have high expectations of behaviour, and establish a framework for discipline with a range of strategies, using praise, sanctions and rewards consistently and fairly • manage classes effectively, using approaches which are appropriate to pupils' needs in order to involve and motivate them • maintain good relationships with pupils, exercise appropriate authority, and act decisively when necessary. • 		
8. Fulfil wider professional responsibilities	<ul style="list-style-type: none"> • make a positive contribution to the wider life and ethos of the school • develop effective professional relationships with colleagues, knowing how and when to draw on advice and specialist support • deploy support staff effectively • take responsibility for improving teaching through appropriate professional development, responding to advice and feedback from colleagues • communicate effectively with parents with regard to pupils' achievements and well-being. • 		

Part two: Personal and professional conduct

A teacher is expected to demonstrate consistently high standards of personal and professional conduct. The following statements define the behaviour and attitudes which set the required standard for conduct throughout a teacher's career.

Standard	Standard met?	Evidence/ Dates
<ul style="list-style-type: none"> • Teachers uphold public trust in the profession and maintain high standards of ethics and behaviour, within and outside school, by: <ul style="list-style-type: none"> • treating pupils with dignity, building relationships rooted in mutual respect, and at all times observing proper boundaries appropriate to a teacher's professional position • having regard for the need to safeguard pupils' well-being, in accordance with statutory provisions • showing tolerance of and respect for the rights of others • not undermining fundamental British values, including democracy, the rule of law, individual liberty and mutual respect, and tolerance of those with different faiths and beliefs • ensuring that personal beliefs are not expressed in ways which exploit pupils' vulnerability or might lead them to break the law. • Teachers must have proper and professional regard for the ethos, policies and practices of the school in which they teach, and maintain high standards in their own attendance and punctuality. • Teachers must have an understanding of, and always act within, the statutory frameworks which set out their professional duties and responsibilities. 		

St Bede's Inter-Church School Teacher Appraisal Proforma



Name of appraisee	Post held by appraisee	Name and role of appraiser
Date of planning meeting	Date of mid-year review meeting	Date of end of year review meeting
Click or tap to enter a date.	Click or tap to enter a date.	Click or tap to enter a date.
Wishes to be considered for pay progression?	Job description reviewed?	
	<input type="checkbox"/> Yes <input type="checkbox"/> No	

[Please read the timeline before completing.](#)

When setting objectives, think about baseline evidence, i.e. where are the students/teachers now, where do they want/need to be and how will they get there? At the end of the cycle the same evidence can be measured to show impact.

Objective 1	Success criteria	Evidence to collect	Training & development needs	Link to Teachers' Standards
		<input type="checkbox"/> Data <input type="checkbox"/> Resources shared <input type="checkbox"/> Lesson observation <input type="checkbox"/> Student/staff/carer voice <input type="checkbox"/> Staff training led (specify topic & audience) <input type="checkbox"/> Other	<input type="checkbox"/> Specific support from a colleague (specify) <input type="checkbox"/> Training (specify area) <input type="checkbox"/> Course (specify title & provider) <input type="checkbox"/> Other	Click or tap for drop-down menu
		Please specify evidence	Please specify	
Comments on progress and impact				

Objective 2	Success criteria	Evidence to collect	Training & development needs	Link to Teachers' Standards
		<input type="checkbox"/> Data <input type="checkbox"/> Resources shared <input type="checkbox"/> Lesson observation <input type="checkbox"/> Student/staff/carer voice <input type="checkbox"/> Staff training led (specify topic & audience) <input type="checkbox"/> Other	<input type="checkbox"/> Specific support from a colleague (specify) <input type="checkbox"/> Training (specify area) <input type="checkbox"/> Course (specify title & provider) <input type="checkbox"/> Other	Click or tap for drop-down menu
		Please specify evidence	Please specify	
Comments on progress and impact				

Objective 3	Success criteria	Evidence to collect	Training & development needs	Link to Teachers' Standards
		<input type="checkbox"/> Data <input type="checkbox"/> Resources shared <input type="checkbox"/> Lesson observation <input type="checkbox"/> Student/staff/carer voice <input type="checkbox"/> Staff training led (specify topic & audience) <input type="checkbox"/> Other	<input type="checkbox"/> Specific support from a colleague (specify) <input type="checkbox"/> Training (specify area) <input type="checkbox"/> Course (specify title & provider) <input type="checkbox"/> Other	Click or tap for drop-down menu
		Please specify evidence	Please specify	
Comments on progress and impact				

Assessment of overall performance	Recommendation for pay progression

Date planning agreed by appraisee	Date end of year review comments agreed by appraisee
Click or tap to enter a date.	Click or tap to enter a date.
Date planning agreed by appraiser	Date end of year review comments agreed by appraiser
Click or tap to enter a date.	Click or tap to enter a date.