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 Registered in England & Wales

**THE BLESSED EDWARD BAMBER CATHOLIC MULTI ACADEMY TRUST  
 SUPPORT STAFF APPRAISAL & DEVELOPMENT POLICY AND PROCEDURE**

**Scope**

This procedure shall apply to all support staff employed by the Blessed Edward Bamber Catholic Multi Academy except those on contracts of less than one term. Members of staff who are employed on a fixed-term contract or supply arrangement of at least one term but less than one year will be appraised and have the opportunity for further development. The length of the appraisal period will be determined by the duration of their contract. The Blessed Edward Bamber Catholic Multi Academy Trust believes it is vital to recognise the contribution each member of the support staff makes to the success of the Trust. It is intended to be a supportive process devised to ensure that all support staff have the knowledge and skills they need to fulfil their role and develop their potential, both in terms of the priorities of the Trust and their personal professional development.

**Introduction**

The Blessed Edward Bamber Catholic Multi Academy Trust is committed to encouraging all members of our academies, staff and pupils alike, to achieve their full human potential. The Trust aims to meet this responsibility by encouraging staff to work together through a three phase process, namely:

1. Setting challenging objectives which:
  - a) Recognise the unique contribution that each one makes.
  - b) Enable staff to work towards making that contribution in the fullest sense.
2. Monitoring and supporting staff in this process by:
  - a) Providing a mutually supportive professional relationship between the reviewer and the reviewee.
  - b) Ensuring staff have access to a range of professional development opportunities.
3. Reviewing and celebrating achievement through:
  - a) An annual meeting at which any successes a member of staff is proud of can be formally recorded, alongside evidence covered by formally agreed objectives.

The Trust will therefore seek to ensure that the requirements of appraisal are fulfilled in a manner, which reflects the values of our Mission Statements.

	THIS POLICY DOES NOT CREATE CONTRACTUAL OBLIGATIONS ON THE TRUST	
Page 1 of 6		

**THE BLESSED EDWARD BAMBER CATHOLIC MULTI ACADEMY TRUST**  
**SUPPORT STAFF APPRAISAL & DEVELOPMENT POLICY AND PROCEDURE**

**Procedures**

The aim of the Appraisal & Development Policy is:

- To continually improve the performance of individuals and the academies by enhancing skills, flexibility, motivation and working relationships;
- To provide clear identification of the individual's contribution to the academies and Trust's goals based on agreed objectives;
- To identify and review the individual's development and training needs in order to meet those objectives;
- To provide a framework and enthusiasm for self-development and training needs in order to meet those objectives;
- To identify organisational and/or operational changes which may be needed to facilitate enhanced performance;
- To improve communication by reflecting on performance and providing constructive feedback;

The appraisal and development period will run for twelve months from 1st September to 31st August each year.

Each member of the support staff will be allocated an appraiser, usually their line manager. An appraiser will not usually be required to undertake more than four appraisals. Where a member of staff has a number of different roles/jobs which are from the same job family s/he will have one appraisal covering the different roles/jobs.

Data and information relating to desired outcomes of the member of staff's role will be used as part of the appraisal process where appropriate.

The Trust Business Manager is responsible for overseeing the Appraisal & Development Policy and will monitor its implementation and the results. Access to appraisal documentation will be limited to the appraisee, the appraiser, the Headteacher, The Academy's Professional Development C-ordinator, the Trust's CEO and the Trust Business Manager.

**Setting Challenging Objectives**

Objectives for each member of staff will be set before, or as soon as practicable after, the start of each Appraisal & Development period. The objectives set and development opportunities provided must be in accordance with the member of staff's job description.

The objectives set for each member of staff will be SMART:

- Specific – precise and unambiguous to ensure both appraisee and appraiser understand what is being aimed for;
- Measurable – what success will look like in ways that will provide evidence of that success;
- Achievable – feasible and without barriers the appriasee cannot overcome;
- Relevant – in line with team, academy and Trust objectives;
- Time-bound – deadline for achievement

The number of objectives will depend on the size and scope of the role up to a maximum of four. Objectives should be clearly linked to the person's job description, team's priorities or the strategic objectives of Trust. Once the objectives are set, development needs should be considered to enable the individual to perform well. This should also include consideration of motivation, job satisfaction and career plans.

Effective date: April 2017

Version 1.5

Blessed Edward Bamber Catholic Multi Academy Trust

	THIS POLICY DOES NOT CREATE CONTRACTUAL OBLIGATIONS ON THE TRUST	
Page 2 of 6		

**THE BLESSED EDWARD BAMBER CATHOLIC MULTI ACADEMY TRUST**  
**SUPPORT STAFF APPRAISAL & DEVELOPMENT POLICY AND PROCEDURE**

Where formal continuing professional development (CPD) is identified as a requirement, consideration should be given to the financial implications and the priority should be ranked as:

- (1) Essential for the appraisee to meet their objectives;
- (2) Will support the team/academy/Trust priorities;
- (3) Personal development needs and aspirations.

In addition to traditional training courses, other opportunities for CPD that should be considered include coaching, mentoring, observation and professional collaboration. The objectives discussed will be captured on the Personal Development Plan signed by both the appraiser and the appraisee. The completed form will be passed to the Trust Business Manager. The appraiser and appraisee should retain a copy to check objectives and monitor progress.

### **Monitoring and Supporting Staff**

#### **Interim Review**

An interim review will be undertaken during the Lent Term to revisit objectives and consider progress towards achievement as well as monitoring the completion, quality and impact of the development opportunities identified. If objectives are amended to reflect changing priorities or circumstances, this must be recorded on the Personal Development Plan then a revised copy should be passed to the Trust's Business Manager. The appraiser will inform the appraisee of the time and location of the meeting at least one week in advance to provide sufficient time for reflection and planning.

It is important for the line manager to maintain ongoing professional dialogue with the appraisee in respect of performance or development as part of day-to-day line management. It is not appropriate to wait for formal meetings if there are issues which need to be discussed.

### **Reviewing and Celebrating Achievement**

#### **Annual Review**

The annual review will provide an opportunity to discuss performance against objectives, continuing professional development and future career plans. The appraiser will inform the appraisee of the time and location of the meeting at least one week in advance to provide sufficient time for reflection and planning. All reviews should be completed before the October half term. The review is confidential and requires a quiet room for at least one hour without interruptions. At this point, objectives and associated development needs for the next appraisal period will also be set.

At the end of the meeting, the Appraisal Review Form and the Personal Development Plan will be completed and signed by both the Appraiser and Appraisee. The completed forms will be passed to the Trust Business Manager and the Appraiser will retain a copy to check objectives and monitor progress.

#### **New Starters**

Where individuals start a new job part way through the appraisal period, objectives will be set within four weeks of their start date. Realistic objectives will be set taking into account the time period before the next scheduled interim or annual review.

Effective date: April 2017

Version 1.5

Blessed Edward Bamber Catholic Multi Academy Trust

	THIS POLICY DOES NOT CREATE CONTRACTUAL OBLIGATIONS ON THE TRUST	
Page 3 of 6		

**THE BLESSED EDWARD BAMBER CATHOLIC MULTI ACADEMY TRUST**  
**SUPPORT STAFF APPRAISAL & DEVELOPMENT POLICY AND PROCEDURE**

**Disagreement Resolution**

If the appraisee and appraiser do not agree in relation to performance or objective setting, the Head Teacher, in the case of academy staff, or the Trust's CEO, in the case of Trust staff, will be made aware of the situation in order to arbitrate. Every effort will be made to resolve the disagreement amicably. If an amicable solution is not reached the appraiser will determine the review statement or objectives set and a separate statement by the appraisee will be attached to the form.

**Training**

On implementation of this policy training will be provided for all support staff. Thereafter training will be provided annually for appraisers and as part of the induction programme for new starters.

**Review of this Policy**

This procedure was produced in July 2015. It will be kept under regular review and any proposed changes will be the subject of consultation with the recognised trade unions.

	THIS POLICY DOES NOT CREATE CONTRACTUAL OBLIGATIONS ON THE TRUST	
Page 4 of 6		

**THE BLESSED EDWARD BAMBER CATHOLIC MULTI ACADEMY TRUST  
SUPPORT STAFF APPRAISAL & DEVELOPMENT POLICY AND PROCEDURE**

**Support Staff Personal Development Plan**

**Name:**

**Date:**

**Job:**

**Academy:**

**Line Manager:**

<b>Agreed Objectives</b>	<b>Success Criteria</b>	<b>Deadline</b>	<b>Development Required</b>	<b>Interim Review</b>	<b>Annual Review</b>

**Signed by Staff Member:**

**Date:**

**Signed by Line Manager:**

**Date:**

Effective date: April 2017

Version 1.5

Blessed Edward Bamber Catholic Multi Academy Trust

	THIS POLICY DOES NOT CREATE CONTRACTUAL OBLIGATIONS ON THE TRUST	
Page 5 of 6		

## Support Staff Appraisal Form

**Name:**

**Line Manager:**

**Job:**

**Date:**

**Academy:**

	Staff Member's Comment	Line Manager's Comment
What do you think has worked well in the last year?		
What do you think has worked less well?		
What areas do you think are your strongest?		
What areas do you think require improvement?		
Have you received the appropriate resources and support?		
Impact on desired outcomes? (Data and information)		
What are your career plans?		
Other comments		

**Signed by Staff Member:**

**Date:**

**Signed by Line Manager:**

**Date:**

Effective date: April 2017

Version 1.5

Blessed Edward Bamber Catholic Multi Academy Trust

	THIS POLICY DOES NOT CREATE CONTRACTUAL OBLIGATIONS ON THE TRUST	
Page 6 of 6		