**‘My Appraisal’ scheme**

This is a relatively simple scheme which in 2015 replaced the former performance management scheme in schools where the City Council is the employer. The guidance for schools has slight differences from the City Council’s guidance; for example, **objectives in schools should be aligned to the priorities in the school’s development plan.**

Employees’ performance is assessed on the basis of the way in which they exemplify ‘Values and Behaviours’ and meet their objectives. **In order to progress an employee must be assessed as achieving in both Values and Behaviours and in their Objectives.**

Managers are required to arrange appraisal conversations with their staff. The number of such conversations is agreed between manager and employee and may be supplemented by informal conversations. These windows have been calendared as follows:

* **Deadline for target setting – October 23rd 2020**
* **Deadline for Mid-term Review – 19th March 2021**
* **Final review of targets – October 2021 and the new cycle to start.**

Assessment for pay progression still takes place at the end of the school year, with pay progression for eligible employees being **backdated to 1st April** within that school year.

**'My Appraisal' key points as an employee:**

* Be expected to engage in professional conversations with your manager, meeting face to face on a regular basis to discuss your progress.
* Focus on achieving objectives and development that will enable you to grow and manage your career in line with the school development plan and priorities.
* Know what your career aspirations are and how you are going to get there through your development activities.
* Record your discussions in a format that works for you, your manager and your school. It is not about gathering supporting evidence in folders or other bureaucratic processes.
* Role model the school’s values and behaviours every day and discuss how you have demonstrated them in your conversations.
* Receive a rating that is simple; you will either be "Achieving" or "Not Achieving."
* Agree your next steps with your manager looking at all relevant learning and development activities. Your rating is the only piece of information that has to be recorded centrally.
* You will receive an increment in pay if you are rated "Achieving", unless you are at the top of your grade.

**Your appraisal conversation needs to cover the following areas in discussions with your Manager:**

* Objective setting (linked to the aims and priorities of the SDP)
* Values and Behaviours
* Appropriate training and CPD activities
* My Appraisal Form completion

**Objective Setting**

This section is where you establish objectives **aligned to the values and behaviours of our school and the school development plan priorities**. It is also important for the you to think about how the objectives will develop you in your career.

You will need **to align your appraisal objectives to the school’s development plan priorities** as approved by Governors which the Head Teacher and Senior Leaders share with all members of staff. A copy of the latest School Development Plan can be found on **RM/Staff/ Staff Documents and in the Middle Leader Handbook with all the other Performance Management documentation.**

The goals should be specific, measurable, achievable, realistic, timely and agreed. Manager and employee adhering to values and behaviours of the school should lead to agreed objectives. **There are no minimum or maximum number of objectives; however, the employee and their manager need to consider how many objectives are relevant to the employee’s role and responsibilities.**

We recommend that you set **at least two objectives as well as a behaviour objective.**

Values and Behaviours underpin how we ensure that we are all “making a positive difference” to the lives of our pupils at TGGS. These can be found in the Birmingham City Council document (attached) and exemplified in our Mission Statement (again attached and on the school website).

**What does success look like?**

It is important for you and your appraiser to identify what success looks like and how it is going to be demonstrated.

What are your objectives, if achieved going to look like in the school and in your role? How are you going to measure them? Consider the behaviours and how they relate to you? Behaviours that are "just right" and how you intend to maintain these throughout the course of the year, behaviours that are "too much" or "too little" and what you can do to get them "just right." What are the behaviours that can develop the you further that help you with current aspirations?

**Development activities linked to your Goals**

In your appraisal you should make sure that you agree development objectives which will:

* Improve your performance in the role that you do now
* Help to stretch you in your performance, and help you succeed
* Help you to fulfil your future career aspirations
* Build upon your strengths

It is easy to think that all development objectives need to be addressed by formal training opportunities, but this is not always the case. In the current climate it is important to be as innovative as possible about how you can build development into your role. Remember if this involves time away from your work role or any financial costs, you will need to make sure this is agreed during your Appraisal Conversation.

If you are a 'Chartered Professional' (for example Accountants, HR Officers) then your professional body may have specific expectations that you undertake CPD. If so, this should be discussed along with any other development requirements, during your appraisal conversation.

As part of your objectives and development activities you should consider sharing your knowledge and experience with colleagues and/or trainees to develop them and to enhance your skill set.

**Please complete a Training Needs form if appropriate and place in JH’s tray when setting the objectives. Extra copies are in the Performance Management section of the Middle Leader Handbook on Moodle.**

**Examples of Performance Objectives**

**Below are 6 examples of Performance Objectives. These should be relevant to the jobholder’s role and the level of performance they are expected to demonstrate at their grade.**

**1. Teaching Assistant – GR3 SEND -** To develop and adopt relevant strategies to support the work of the teacher and increase achievement of SEND pupils with their reading in Year 7.

**To meet this objective**

Reading Ages and barriers to reading identified for key pupils and relevant strategies to support them are in place. Liaising with all teachers of these pupils ensuring that they are aware of the different issues and strategies via Pupil Passports. Small group intervention has taken place and resources developed.

**Evidence to support objective**

* Passports are used by teachers of the identified pupils.
* Reading Ages of the identified pupils show an increased greater than chronological increase by the end of the PM cycle.
* Records of small group interventions.
* Resources to support reading are in place.
* Meeting notes / feedback from teaching staff.

**2. School Administrator GR2 –** To maintain accurate pupil records on attendance and alerting parents / carers and Heads of Year to unauthorised absence within deadlines.

**To meet this objective**

* Work with School Attendance lead to identify trends and persistent non-attendance.
* Produce reports for Heads of Year / Headteacher/ Governors

**Evidence to support objective**

* Termly checks on system reports.
* Records are accurate and updated with X hour of registration.
* Parents or carers notified within X minutes of registration.
* Termly report to Headteacher is complete and accurate.
* Feedback from the School Attendance lead.

**3. Classroom and Office based staff – all grades -** To maintain pupil records in accordance with the school’s pupil record keeping policy.

**To meet this objective**

Full and accurate records are in place and available for use as and when needed.

**Evidence to support objective**

Staff and parents report that records are available and useful.

**4. ICT Technician GR2 –** To respond to equipment and software failures within service level deadlines liaising with all relevant staff and agencies as appropriate.

**To meet this objective**

* Produce reports on number of failures and trends with recommendations for solutions.
* Suggest solutions.
* Train users to prevent future failures.

**Evidence to support objective**

Monthly log of failures and responses. Report to appropriate member of the Senior Leadership Team on analysis and recommendations.

**5. Science Technician GR2 -** To undertake regular audits of all materials held in the science storage room and ensure that they meet current guidelines for safety and to arrange appropriate disposal of any materials that are out of date or pose a health risk.

**To meet this objective**

* Implement and review audit procedure.
* Forecast disposal dates and arrange for regular disposal.
* Identify costs of disposal.

**Evidence to support objective**

* Audits completed on time.
* No reports of outdated materials being used.
* Spot-check audit

**6. Building Site Manager GR3 -** To develop a map of the buildings and assign colour coding to location of mains gas, electricity, water supplies and controls. Include location of fire-fighting equipment, alarms and first aid kits, information on telephones and data terminals. Provide the information to all relevant staff in case of emergency when BSS not on site. Complete by X Term

**To meet this objective**

Produce a map as set out in the objective including instructions on authorised use of controls and emergency numbers.

**Evidence to support objective**

* Map available and accurate.
* Relevant staff have received copies and can interpret them.

**Objectives for Managers**

**Those with responsibility for the appraisal of others should have a minimum of one appraisal objective related to this responsibility.** **Two examples of management objectives are found below:**

**1. To Lead and manage people and resources through effective and efficient implementation of relevant policies and procedures by:**

* Ensuring regular My Appraisal conversations are undertaken with support staff and ensuring they are supported in achieving their objectives and demonstrating their values and behaviours
* Managing staff absence to minimise disruption to the operation of the school.
* Ensuring internal communication keep staff well informed and engaged with school performance issues that affect their role.

**To meet this objective**

* Devolve responsibility for some reviews and develop the abilities of others to undertake these conversations.
* Produce monitoring reports on absence levels and contingency plans to ensure resilience of school support operations
* Improve on current levels of communications. Review current internal communications strategy and methods. Provide a report with recommendations.

**Evidence to support objective**

* My Appraisal conversations are undertaken regularly and all support is provided in a timely manner.
* Return to work interviews are timely and swift action taken to avoid or address disruption due to absence.
* Feedback from staff.

**2. To assist compliance with financial systems and procedures of the school by:**

* Providing clear guidance and advice on financial matters to the Headteacher and Governors to enable them to make considered and timely decisions.
* Taking time to listen and ask appropriate questions in SLT and Governors meetings to ensure that guidance on financial implications of school plans is understood.
* Co-operating with external advisers to resolve problems with financial systems.
* Provide timely guidance to the administration team to enable them to achieve the smooth running of school systems.

**To meet this objective**

* Keep current financial systems under review and develop proposals for revisions that will lead to greater efficiency
* Develop and deliver information reports to SLT and Governors to enhance their understanding of financial procedures and improve compliance with them in day-to-day operations

**Evidence to support objective**

* Feedback from Head teacher, administration team and Governors.
* Written evidence of communicating with team.

**The Values & Behaviours Objective**

**At least one of the objectives set must be a Values and Behaviour Objective.** Values and Behaviours underpin how we ensure that we are all 'making a positive difference” and they set the standard for how objectives will be achieved, and will make it easier to differentiate between good performance and excellent performance at work.

Your objectives must be appropriate to you and should clearly linked to the **four values of a Birmingham City Council employee** which are:

1. **We put citizens first, especially young citizens** – we are empathetic and respectful in everything we do.
2. **We are true to our word** – when we make promises, we keep them.
3. **We act courageously** – we lead, we manage and we tackle the difficult issues.
4. **We achieve excellence** – we aspire to get things right, first time

An employee’s **values and behaviours should be based upon our school ethos and vales – please see the TGGS Mission Statement at the end of this document**. Make sure that both the manager and employee understand what is expected in the way that values and behaviours are demonstrated.

**The examples given below are to aid discussion:**

**1. School Administrator**

Support the school ethos of respect for each other by:

* Making time to listen carefully to people to understand their needs
* Responding sensitively to differences and treating people with respect
* Taking account of the views of others when taking decisions
* Remaining calm and reassuring in difficult situations

**Evidence to support the values and behaviours objective**

* Observation in formal and informal meetings. Feedback from peers and line manager

**2. Receptionist/Administration**

Help maintain and improve the professional image of the school by:

* Treating all visitors with respect and understanding.
* Keeping the reception office tidy and presentable and embracing new ways of working to encourage change
* Keeping people informed and up-to-date on school activities and listening carefully to all visitors
* Accepting responsibility for actions and decisions

**Evidence to support the values and behaviours objective**

* Weekly checks on reception. Notice boards kept up to date. Desks clear of filing and sensitive data. Observation. Feedback from parents/carers.

**3. Teaching Assistant Level 2 and Level 3**

Support our aim for inclusive culture by:

* Adhering to the Professional Standards for Teaching Assistants.
* Treating the children fairly and with respect and kindness.
* Remaining calm and reassuring when carrying out activities with groups of children.
* Provide support to children with different needs to ensure they feel a valued member of the group.
* Informing the teacher of any matters of concern by communicating in a clear and effective manner

**Evidence to support values and behaviours objective**

* Observation by teachers / SENDCO,
* Feedback from Ofsted report / external review
* Feedback from parents/carers and children.

**4. Cleaning Staff**

Continue to be pro-active in promoting the school's ethos and vision through:

* the active and positive encouragement of all as individuals and as a team;
* expecting and modelling high expectations and aspirations of behaviour;
* using the language of mutual respect.

**Evidence to support values and behaviours objective**

* Feedback from internal staff, observation from line-manager

**5. Building Services Manager**

Collaborate with staff and visitors to provide an effective environment at school by:

* Making time to listen carefully to people to understand their needs.
* Providing guidance to staff and visitors in a polite and positive manner.
* Adapting priorities and approach to the maintenance of the building.
* Seeking feedback from the Head Teacher/Bursar on matters relating to the smooth running of the school site and use information to improve working practices.

**Evidence to support objective**

* Feedback from internal staff. Maintenance records. Notes of meetings with external contractors.

**On-going Appraisal Conversations / Mid Term Reviews**

You and your manager must ensure that there is sufficient opportunity for you to engage with each other and demonstrate your progress. This conversation should reflect the following:

* Progress against your behaviours, objectives and development activities
* Exchanging all feedback - positive, and any constructive comments
* Agreeing an action plan
* Following up any action points from previous meetings
* Discussing evidence of progress

To get the best out of yourself and your experiences throughout the year, you should reflect on what you have done, and consider:

* What worked well, why, and what was the outcome?
* What did not work well, and why?
* How could you change/adapt your experience?

We are all motivated by different things within our lives and work. These things can change, depending on our life context and circumstances. It is worth taking time to understand what motivates you, and discuss this with your manager during your ongoing appraisal conversation.

**The deadline for the Mid-Term Review to have taken place is 19th March. All documents should be updated and emailed to the Appraisee and to JH.**

**Team Conversations**

Line managers and your team may wish to have a group conversation about how to improve and develop as a team. This conversation might include:

* Conversations about achievement of team objectives, behaviour and development activities
* Changes to workload and new initiatives that may require objectives to be changed
* Role modelling and recognising the purpose whilst living the values and behaviours
* Identification of barriers and difficulties and discussion about how these can be resolved
* Acknowledging achievements and excellent behaviour as a group

**Review**

Your conversations should result in a final discussion that completes your Appraisal conversations for the year and concludes with two ratings:

* Completion of role modelling our schools Values and Behaviours
* Completion of your objectives
* **You must ‘achieve’ in both in order to ‘achieve’ overall.**

If you have several objectives, there may be mitigating circumstances or issues beyond your control which stop you from completing them all. Therefore, your manager will need to take a common-sense approach to decide whether you are ‘achieving’ or ‘not achieving’, based on your overall performance for the review period.

**Rating**

The final rating should present no surprises at the end of the appraisal period. Any concerns should have been raised and addressed in earlier conversations.

If the overall rating is "achieved", you may be eligible to receive an increment. (See Pay)

If the rating is "not achieved" then you and your appraiser must discuss the actions that need to be taken to help you to improve.

An eventual result of this action could be a discussion linked to the capability procedure. Therefore, any such discussion must be clear to ensure that the employee understands where future improvement is required and how to address it.

**Pay**

Once provisional ratings have been signed off, your rating will be used to make an assessment to receive an increment where you are currently not at the top of their grade.

Appraisal related increments are linked to an employee’s Spinal Column Point and time in grade during the previous Appraisal year. A requirement of 6 months in the same grade is a principle which underpins the eligibility criteria.

**Special Circumstances**

At the end of the appraisal year, when the final ratings are being agreed, if your line manager is absent, it is important that arrangements are put in place to ensure that your appraisal assessment is completed. It is recommended that this responsibility is taken up on behalf of your manager by a peer manager, or by your manager's line manager. A meeting should then take place with the substantive manager once they return to work.

Similarly, if you are absent when final ratings are being agreed, the line manager should complete the appraisal assessment based on the conversations which have taken place during the year. When you return to work, your manager should discuss the assessment with you to give you an opportunity to comment and make amendments as appropriate. If you are absent for a significant part of the year due to:

* Long term absence
* Maternity related sickness
* Maternity Leave
* Paternity Leave
* Adoption Leave
* Disability related illness
* Industrial Injury
* Suspension without prejudice

your line manager may use the previous year's performance as a guide of predicted performance and award the appropriate rating.

Where there is no previous performance information (i.e. no previous performance rating), your manager is advised to base the assessment on the evidence of your performance in the current year.

If you change your role mid appraisal year, your previous manager should make an assessment against your objectives and behaviours achieved to date. Your will then have an appraisal conversation with your new manager to set goals for the remainder of the appraisal year. It is good practice for both managers to meet with you to discuss the end of year assessment and a final assessment made based on the combined evidence from both roles.

**Acting Up**

If the acting up is for a short period only, then while the new manager may set some objectives for the acting up role in order to provide clarity, the substantive manager also needs to ensure that objectives are put in place for the substantive role which you will be delivering for the majority of the year.

On the last day of the performance cycle the member of support staff will need to have been on the same grade or higher for at least 6 months over the performance year as this is one of the pay progression eligibility criteria for an increment. If the member of support staff’s time in grade does not meet these criteria, no performance related increment will apply. However, scoring against objectives and final ratings should still take place as once the person returns to their substantive post it may be that the final rating achieved can be applied to the substantive post and any associated increment for which the member of support staff may be eligible, could then be applied.

**Quality Assurance**

All completed objectives will be moderated internally by SLT for consistent practice and fairness in the setting of objectives. They are accountable to the Governing Board to ensure an effective implementation of the appraisal scheme. **The scheme and objectives and outcomes will be reviewed by the Governing Board.**

**TGGS Mission Statement**

Our vision is to provide for our young people the very best teaching and a supportive environment where their talents are nurtured and insecurities overcome. We will support the young people of our community throughout their childhoods to build their aspirations and ensure their needs are met.

We work to put our school at the heart of the community. By working together with other schools and agencies we have greater capacity for success. Through our co-operative ethos we pool our efforts, ideas and enthusiasm to support our young people and their families in ways that would not be possible on our own. As educators, learners, parents, young people and wider community, we draw upon both our own strength and the expertise of partner organisations.

We work to give parents, pupils, staff and the wider community a strong voice in the development of education and services in the area. The children in our area deserve the very best education and we will strive to deliver it. We are their champions. Together, we succeed.

**Aims**

* To enable our pupils to be strong and independent – able to form healthy and respectful relationships, able to safeguard themselves and each other from exploitation and violent extremism and able to stand up for British and cooperative values.
* To secure the highest possible academic standards and levels of challenge for our pupils and to prepare our pupils for the constantly changing challenges of life and work after school.
* To provide a curriculum which is broad, balanced and relevant to each pupil, providing a breadth of experiences and allowing pupils to discover their passions.
* To create a happy and positive learning environment, fostering mutual respect, consideration for others and personal responsibility.
* To be committed to developing positive relationships with parents, promoting education as a partnership between home and school.
* To provide a school-based experience for all our pupils which promotes equality of opportunity and seeks to overcome barriers to their achievement.
* To prepare our pupils for life after school so they are able to access the best opportunities in further education and the world of work. We achieve this by working closely with colleges and employers in addition to providing excellent independent careers advice.
* To encourage our pupils to be creative, resilient and independent learners.
* To establish effective working relationships with other professionals for the benefit of all. We work with partner schools, particularly Turves Green Boys’ School and Cofton Primary School to improve all of our schools.
* To promote Turves Green Girls’ School as part of the wider community, through our implementation of our cooperative values, specifically our commitment to democracy.
* To provide a safe and caring environment in which all pupils can make a positive contribution to their learning, school and community.
* To provide the best possible environment and inspirational teaching by using current technology and new approaches in the classroom.

**Values**

* Every child and every member of staff at Turves Green Girls’ School matters. We recognise that staff are best able to support children when their workload is realistic and they are happy in their role.
* We continually strive to promote and nurture the health and well-being of our pupils and our staff.
* Our commitment to democracy means that we believe all stakeholders should have a say in how we run our school. We believe that making a better school for our pupils arises from a cooperative approach, respecting the views of our stakeholders.
* We actively promote the sharing of good practice both within the school and through extended partnerships to provide the very best opportunities for our pupils. We share the cooperative value of self-responsibility – we take responsibility for our actions.
* We actively promote the school as a community which aspires to gain experience beyond our geographical horizons.
* We strive to combat gender stereotyping and aim for our pupils to be fully prepared to take active roles in their future. We share the cooperative values of equality and equity – equal rights and benefits according to contribution and striving to be fair and unbiased.
* We share the cooperative value of solidarity – we support each other and those in other cooperatives.