

## **APPRAISAL Policy**

**Approved by Directors:**

**March 2025**

**Review date:**

**March 2026**

**DIRECTOR LEAD**

## **STAFF APPRAISAL POLICY**

### **APPLICATION OF THE POLICY**

The policy applies currently to the Co- Chairs employed by eCAPH: the Business Manager role is appraised through the Alexandra Trust and the Co-Chairs are happy to add feedback to the overall appraisal documentation based upon her work for one day per week for eCAPH.

### **PURPOSE**

This policy sets out the framework for a clear and consistent assessment of the overall performance of the role of Chair of eCAPH and for supporting their development needs within the context of the eCAPH Business Plan and their own professional needs. The appraisal process needs to be considered alongside the eCAPH Pay & Conditions policy as the assessment of performance throughout the appraisal cycle will be the basis on any recommendation being made by the appraiser and then considered by the Directors of eCAPH.

### **LINKS TO STRATEGIC DEVELOPMENT OF ECAPH**

The Directors of eCAPH expect that objectives set if achieved, will improve the quality of support offered to member schools and contribute to the implementation and achievement of the Business Plan.

#### **The Appraisal Period**

The appraisal period will run for twelve months from 1<sup>st</sup> September to 31<sup>st</sup> August.

#### **Appointing Appraisers**

The Co-Chairs will be appraised by appointed Directors.

Directors will be reviewed every 2 years so that the option for another appraisee can be considered.

Overall feedback to all Directors will be undertaken by appointed appraisers via Directors meeting at the end of the appraisal cycle.

## **Setting Objectives**

The Co-Chairs objectives will be set by the Directors after consultation with the appraisee. The Directors collectively have a duty to have regard to the work-life balance of the Co-Chairs and objectives will reflect this.

Objectives for each Co-Chair will be set after the start the revised eCAPH business plan has been agreed. The objectives set for each person, will be Specific, Measurable, Achievable, Realistic and Time-bound and will be appropriate to the Chair's role and level of experience. The appraiser and Co-Chair will seek to agree the objectives but, if that is not possible, the appraiser will determine the objectives. Objectives should be revised if circumstances change.

Reviewing performance

## **Observation**

The appraiser may want to consider using actual CPD events or eCAPH conferences etc. as being a method to gather evidence for consideration of agreed appraisal targets.

## **Development and Support**

Appraisal is a supportive process which can be used to determine decisions on potential pay progression and inform continuing professional development.

## **Feedback**

Co-Chairs will receive constructive feedback on their performance throughout the year via agreed appraisal meetings. Feedback will highlight particular areas of strength as well as any areas that require further development. Where there are concerns about any aspects of the performance, the appraiser will meet the Co-Chair formally to:

- give clear feedback to the Co-Chair about the nature and seriousness of the concerns;
- give the Co-Chair the opportunity to comment and discuss the concerns;
- set clear objectives for required improvement;
- agree any support (e.g. coaching, mentoring, structured observations), that will be provided to help address those specific concerns;
- make clear how, and by when, the appraiser will review progress (*it may be appropriate to revise objectives, and it will be necessary to allow sufficient time for improvement. The amount of time is up to the school but should reflect the seriousness of the concerns*);
- explain the implications and process if no, or insufficient, improvement is made
- When progress is reviewed, if the appraiser is satisfied that the Co-Chair has made, or is making, sufficient improvement, the appraisal process will continue as normal, with any remaining issues continuing to be addressed through that process.

## **Evidence**

The range and level of evidence collected for appraisal purposes will always be proportionate and minimise workload.

## **Transition to Capability**

If a Co-Chair demonstrates serious underperformance, and has not responded to support provided within the appraisal process, the Co-Chair will be notified in writing that the appraisal system will no longer apply and that their performance will be managed under capability, and will be invited to a formal capability meeting with Directors.

## **Annual Assessment**

Each Co-Chairs performance will be formally assessed in respect of each appraisal period.

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 in interim meetings which will take place (*e.g. once a term*).

The Co-Chair will receive, as soon as practicable, following the end of each appraisal period, an appraisal report and will have the opportunity to comment on it. The appraisal report will include:

- details of the Co-Chair's objectives for the appraisal period in question;
- an assessment of the Co-Chair's performance of their role and responsibilities against their objectives.
- an assessment of the Co-Chair's professional development needs and identification of any action that should be taken to address them;
- a recommendation on pay where that is felt relevant

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

## **APPEALS**

Where a member of staff is dissatisfied with the application of the appraisal process (except for decisions on pay) they have recourse to the Directors to pursue the matter.

## **Confidentiality**

The appraisal process will be treated with confidentiality. However, the desire for confidentiality does not override the need for the Directors to quality-assure the operation and effectiveness of the appraisal system.

## **Consistency of Treatment and Fairness**

The Directors committed to ensuring consistency of treatment and fairness. It will abide by all relevant equality legislation, including the duty to make reasonable adjustments for disabled staff.

## **Retention**

The Directors will ensure that all written appraisal records are retained and stored in a secure place in line with their Retention and Disposal Policy

## **REVIEW OF THE POLICY**

The Directors will review the appraisal policy every 2 school years at its Spring term meeting or will be revised as required to introduce any changes in regulation and statutory guidance to ensure that it is always up to date.