



**St James's Cof E
Primary School**

Let Your Light Shine

Teacher Appraisal Policy (Model Policy)

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Purpose of the Policy

Appraisal is a thorough, supportive, and developmental process which improves teacher performance by concentrating effort on key objectives. A key component to its success is open and honest dialogue between the appraiser and the appraisee. This Policy sets out the framework that this School will use in appraising all staff employed on teachers' terms and conditions, including the Headteacher, using a clear and consistent approach. Appraisal will support development within the context of the School plan for improving educational provision and performance and the standards expected of teachers.

The Appraisal Procedure will also be used to address any concerns that are raised about a teacher's performance. If concerns are such that they cannot be resolved through the appraisal process, there will be consideration of whether to commence capability proceedings.

In line with statutory provisions, the outcome of the appraisal review process will provide the Headteacher/nominated officer with an individual's performance information. The Headteacher/nominated officer will need to make a pay recommendation to the Governing Board/Pay Committee annually for every member of staff employed on teacher's terms and conditions, except where an individual has reached the top of their respective pay range.

Scope of the Policy

This Policy applies to all staff employed on School Teachers Terms and Conditions of employment, including the Headteacher, for one term or more. It does not apply to those who are undergoing an induction period or who are subject to capability procedures.

All staff employed on School Teachers Terms and Conditions will be further referenced in this Policy as teachers.

Appraisal in this School will be a supportive and developmental process designed to ensure that all teachers have the skills and support they need to carry out their role effectively. It will help to ensure that teachers are able to continue to improve their professional practice and to develop as teachers, whilst also providing the mechanism for pay progression.

Principles/Aims

To ensure that the School complies with its legal obligations.

- To maintain and improve the quality of education for pupils in the school, by having an appraisal policy for teaching staff which supports the school's strategic vision and improvement plan.
- To provide a robust framework which enables a clear and consistent assessment of teacher performance, providing indicators of how performance relates to pay progression.
- To emphasise that continuous professional development is integral to a teacher professional development.
- To protect all employees from discriminative practice against any person covered by the protected characteristics of the Equality Act 2010.
- To be implemented in accordance with the provisions of the ACAS Code of Practice in relation to any employment related issues.
- Confidentiality must be observed in accordance with the policy.

Legal Context

The Governing Board recognises the requirement to comply with the Education (School Teachers' Appraisal) (England) Regulations 2012 (the Appraisal Regulations) and aims to follow good practice wherever possible. All teachers have a contractual professional responsibility to engage in effective, sustained, and relevant professional development throughout their careers along with a contractual entitlement to effective, sustained, and relevant professional development.

4.1 Appraisal Arrangements

Revised appraisal arrangements come into force with effect from 1 September 2012. They are set out in the Education (School Teachers' Appraisal) (England) Regulations 2012 (the Appraisal Regulations).

Employment Legislation

Throughout the application of this procedure the school will operate within the legal framework of relevant employment legislation that affects all employees, including:

- Equality Act 2010.
- Data Protection Act 1998 & General Data Protection Regulations (GDPR) 2018
- Employment Rights Act 1996.
- The current School Teachers Pay and Conditions Document.
- Equal Pay Act 1970.
- Any other relevant employment legislation.

4.3 Model Policies

This policy should not be used for:

Incapability due ill health, in these circumstances this Policy should be read in conjunction with the School Managing Absence Policy.

Misconduct, in these circumstances this Policy should be read in conjunction with the School Disciplinary Policy.

This Policy should also be read in conjunction with the.

- School Pay Policy.
- School Capability Policy.
- School Policy on Providing Employment References.

Appraisal & Performance Related Pay

Appraisal in the School will be a supportive and developmental process designed to ensure that all teachers have the skills and support they need to carry out their role effectively. The appraisal process will ensure the School complies with its legal obligations within a fair, transparent, and robust framework. It will help to ensure that teachers are able to continue to improve their professional practice and to develop as teachers, whilst also providing the mechanism for pay progression. All meetings throughout the appraisal process will incorporate professional dialogue between the appraiser and the appraisee. Only by mutual agreement will anyone else attend meetings within the appraisal process.

The Governing Board must ensure an appraisal is conducted for a Headteacher. The Headteacher is responsible for ensuring all other teacher's employed at the school are appraised. The Governing Board is responsible for agreeing pay recommendations made by, and for the Headteacher.

The Appraisal Period

The Schools appraisal period will run for twelve months normally from October to October.

Teachers 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 the contract and the setting of objectives should also take this into account.

Where a teacher starts their employment at the school part-way through a cycle, the Headteacher or, in the case where the employee is the Headteacher, the Governing Board, shall determine the length of the first cycle for that teacher, with a view to bringing this into line with the cycle for other teachers as soon as possible.

Where a teacher transfers to a new post within the school part-way through a cycle, the Headteacher or, in the case where the employee is the Headteacher, the Governing Board, shall determine whether the cycle shall begin again and whether to change the appraiser.

Where a teacher is employed in more than one post, the teacher will be appraised for each post.

Appointing Appraisers

All appraisers of teachers and Headteachers will be suitably qualified, experienced and trained.

Headteacher

The Headteacher will be appraised by the Governing Board, supported by a suitably skilled and/or experienced external adviser who has been appointed by the Governing Board for that purpose.

The task of appraising the Headteacher, including the setting of objectives, will be delegated to a sub-group normally consisting of normally 3 member(s) of the Governing Board.

Where a Headteacher is of the opinion that any of the governors appointed by the Governing Board is unsuitable to act as their appraiser, they may submit a written request for that Governor to be replaced, stating the reasons for the request. The Governing Board/ decision will be final.

Teachers

Teachers' appraiser will be chosen by the Headteacher. Where there is an objection to the Headteacher's choice, their concerns will be carefully considered and, where possible, an alternative appraiser will be offered, however, the Headteacher will make the final decision. All appraisers appointed by the Headteacher will be qualified, experienced, and suitably trained.

Where it becomes apparent that the appraiser appointed by the Headteacher will be absent for the majority of the appraisal cycle, the Headteacher may undertake those duties directly or delegate those duties to another teacher for the duration of that absence.

If the Headteacher appoints an appraiser who is not the teachers line manager, the new appraiser will have an appropriate position in the staffing structure, together with the necessary background knowledge, skills, and training to undertake the role.

The School will decide the appropriate number of appraisee's each appraiser can have.

Standards

Before the start of each appraisal period, or as soon as practicable thereafter, each teacher will be informed of the standards against which their performance in that appraisal period will be assessed. This school will operate under the following standards/assessments.

[Teacher Standards]

[Post Threshold Standards]

[National Standards for Headteacher's]

The appraiser will review the teacher's performance against the appropriate set of standards and consider future objectives to form a progressive professional development plan that suits both the school's improvement plan and the individual's professional development requirements.

Planning and Review Meeting

The following elements will be included in a planning and review meeting for all teachers, including the Headteacher:

- Discussing performance against the relevant teacher standards, linked to career stage, job role and school priorities.
- Review of progress against the objectives set for the previous year for the completion of the cycle.
- Agreeing objectives for the upcoming cycle.

Setting Objectives

The appraiser and appraisee will seek to agree the objectives. Objectives may be revised if circumstances change, which should be done through a formal revision meeting. Should the objectives not be agreed, the final decision on determining the objectives rests with the Headteacher.

The Headteachers objectives will be agreed or set by the designated subgroup of the Governing Board after consultation with the external adviser and the Headteacher.

Objectives for each teacher will be agreed or set before or as soon as practicable after, the start of each appraisal period. The objectives set for each teacher, should be appropriate to their career stage and aspirational to support and encourage professional development and progression through the relevant pay range. Objectives will be Specific, Measurable, Achievable, Realistic and Time-bound (SMART). It is important to ensure that objectives set are defined and structured with clear success criteria. Objectives and associated success criteria should not be vague as these could be misinterpreted

It is important for both parties to plan and prepare prior to going into any appraisal meeting.

The agreed objectives will contain a description of what success may look like and what types of evidence could demonstrate success. The process should also identify the continuous professional development available to aid success. Where numerical targets are agreed, these will be reasonable, in the circumstances in which the teacher works and it will be recognised that factors outside of the teachers' control may affect success.

Setting more than three objectives, or, for example, using sub-targets, can lead to teachers experiencing unreasonable workload and pressure, making the objectives more difficult to achieve. Therefore, other than in exceptional circumstances and only by agreement, no teacher will be given more than three objectives.

The objectives set for each teacher are intended to contribute to the school plans for improving the educational provision and performance and improving the education and life chances of pupils. They will consider the professional aspirations of the teacher.

It is important that the appraiser and the appraisee are both clear on the career aspirations of the appraisee, as the appraisal evidence will inform any decisions on pay progression for the appraisee, including progression to the upper pay range and post threshold standards.

The appraiser will consider the effects of an individual's circumstances, including any disability, when agreeing objectives. For example, this might include a reasonable adjustment to allow an individual slightly longer to complete a task than might otherwise be the case.

When a teacher is absent due to long term sickness or maternity / additional paternity / adoption leave, this will be considered when setting objectives to ensure they are reasonable and proportionate to the timescale. When a teacher returns from a period of long-term absence, a revision meeting should take place and objectives may be reviewed to allow them to readjust to their working environment.

Moderation/Quality Assurance Process

The Governing Board is committed to ensuring consistency and fairness in the application and operation of the appraisal process. To ensure this, the following provisions are made in relation to moderation, quality assurance and objective setting.

The Headteacher may:

Moderate all the planning statements to check that the plans recorded in the statements of teachers at the school:

Are consistent between those who have similar experience and similar levels of responsibility. Comply with the Schools Appraisal Policy, the regulations, and the requirements of equality legislation.

Contribute to the Schools plans for improving its educational provision and performance and improving the education of its pupils..

OR

Moderate a sample of planning statements to check that the plans recorded in the statements of teachers at the school:

Are consistent between those who have similar experience and similar levels of responsibility. Comply with the schools appraisal policy, the regulations, and the requirements of equality legislation.

Contribute to the schools plans for improving the schools educational provision and performance and improving the education of pupils within the school.

Pay Progression – All teaching staff

The Governing Board must consider annually whether to increase the salary of teachers who have completed a year of employment (as defined in the document) since the previous annual pay determination and, if so, to what salary within the relevant pay range.

The decision whether to award pay progression will be related to the teacher's performance, as assessed through this Policy. A recommendation on pay will be made in writing as part of the Appraisal Report; and the Governing Board will consider this when making their pay decision.

In this school all teachers can expect to receive regular, constructive feedback on their performance and are subject to annual appraisal that recognises their strengths, informs plans for their future development, and helps to enhance their professional practice, whilst providing the mechanism for pay progression.

To be fair and transparent, assessments of performance will be properly rooted in evidence as set out in the schools Pay Policy. In this school we will ensure fairness by the Headteacher ensuring

that objectives and assessments are consistent and transparent by the process of moderation through the Appraisal Policy.

The Governing Board has agreed the Pay Policy of the school and has considered the implications of the Appraisal Policy with respect to the arrangements relating to teachers' pay in accordance with the School Teachers' Pay and Conditions Document. The Governing Board will ensure that decisions on pay progression are made by [e.g., Pay Committee] for Headteacher's and by the [e.g., Pay Committee] for other teachers, as set out in the Schools Pay Policy.

Where any teacher is dissatisfied with their level of pay progression or has not been recommended for pay progression, they will have the right to raise a pay grievance in line with the School Pay Policy.

Pay Progression – Teaching Staff (Non-Leadership Group Members)

Where a teacher is not subject to either the 2012 or the 2011 Regulations, the Governing Board/ /Headteacher/Appraiser will determine through what process the teacher's performance will be assessed, except in the case of Early Career Teachers (ECT's), who will be subject to the statutory induction process set out in Sections 135A, 135B and 141C(1)(b), of the Education Act 2002 and The Education (Induction Arrangements for School Teachers) (England) Regulations 2012 as amended.

Continued good performance as defined by the Schools Pay Policy should give a teacher an expectation of progression to the top of their respective range.

A decision may be made not to award pay progression, where the teacher is subject to capability proceedings.

Pay Progression – Leadership Group Members

Pay decisions made via the appraisal process, must be clearly attributable to the performance of the individual.

Sustained high quality performance having regard to the results of the most recent appraisal carried out in accordance with the 2012 or 2011 Appraisal Regulations or the objectives agreed or set, should give the Leadership Group Member an expectation of progression through the pay range.

A decision may be made not to award pay progression, where the Leadership Group Member is subject to capability proceedings.

Reviewing Performance

Throughout the period of appraisal, performance should be reviewed, and feedback provided as appropriate and professional dialogue should take place throughout the year.

Observation

This school believes that observation of classroom practice and other responsibilities is an important way of assessing a teacher's performance to identify any strengths and areas for development and of gaining useful information which can inform school improvement more generally.

The effective and efficient operation of the appraisal process requires lesson observation to be a confidential process of constructive engagement within an atmosphere of support and co-operation.

Accordingly, observations will be carried out in a supportive manner, with professionalism, dignity, integrity, and courtesy, will be evaluated objectively and reported accurately and fairly taking account of circumstances which may affect performance on the day.

At least 5 working days' notice of the date and time of the observation will be given, and verbal feedback provided by the end of the next school day and confirmed in writing within 5 working days, unless circumstances make this unreasonable or a delay is mutually agreed.

Classroom observation will be carried out by qualified teachers, except where regulations exempt qualified status.

For the purpose of appraisal, teacher's performance will be observed on an appropriate and reasonable number of occasions and will, as far as possible, be agreed by the appraiser with the appraisee based on the individual circumstances of the teacher and the overall needs of the school. The number and duration of appraisal observations will be in accordance with the school observation protocol, which includes provision for exceptional circumstances where there are concerns about a teacher's performance, or where the teacher requests additional observation visits. The recommended maximum number of formal observations is three.

For the purpose of professional development, feedback about lesson observations should be developmental, not simply a judgement using Ofsted grades.

This school will use the findings of each observation, including appraisal observations, for other management requirements (for example subject area reviews), thereby seeking to minimise the total number of occasions on which teachers are observed.

Teachers (including the Headteacher) whose posts have responsibilities outside the classroom should also expect to have their performance of those responsibilities observed and assessed.

Headteachers or other leaders with responsibility for learning and teaching standards may "drop in" or undertake other observations to evaluate the standards of teaching and learning and to ensure that high standards of professional performance are established and maintained. The length and frequency of "drop in" or other observations, and the notice to be given, will vary depending on specific circumstances but will be in accordance with the school classroom observation and drop-in policy.

Development and Support

In this school, appraisal will continue to be a supportive process which will be used to inform a teacher's continuing professional development. The school will encourage a culture in which all teachers take responsibility for improving their teaching through appropriate professional development, e.g., through peer observation. Professional development will be linked to school improvement priorities and to the on-going professional development needs and priorities of individual teachers.

The School CPD programme will be informed by the training and development needs identified as part of the appraisal process. The Governing Board will ensure when budget planning that, as far as possible, resources are made available in the school budget for the appropriate training, and support agreed for appraisees, maintaining access on an equitable basis.

Regarding the provision of CPD and in the case of competing demands on the school's budget, a decision on relative priority will be taken regarding the extent to which:

- the training and support will help the school to achieve its priorities.
- the CPD identified is essential for an appraisee to meet their objectives.
- the CPD is identified as aspirational by an appraisee.

Account will be taken in a review meeting of where it has not been possible for teachers to fully meet their performance criteria because the CPD support recorded in the planning statement has not been provided/attended.

Feedback

Teachers will receive constructive feedback on their performance throughout the year and as soon as practicable after observation has taken place or other evidence has come to light.

Feedback will highlight areas of strength as well as any areas that need further development, agreeing appropriate action to be taken.

Where there are concerns about any aspects of the teacher's performance, the appraiser will arrange to meet the teacher formally, as an appraisal revision meeting, to review their performance. In this meeting the appraiser will:

- Give clear feedback to the teacher about the nature and seriousness of the concerns.
- Give the teacher the opportunity to comment and discuss the concerns.
- Set clear objectives for required improvement.
- Agree any support (e.g., coaching, mentoring, training and / or 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 will be determined by the school but should reflect the seriousness of the concerns).
- Explain the implications and process if insufficient or no improvement is made e.g., impact on pay progression and potential move to capability.
- The teacher will be informed that they may not receive any future pay progression, until performance is consistently good.
- The range and level of evidence collected for appraisal and pay determination purposes will always be proportionate and aim to minimise workload.

When progress is reviewed, if the appraiser is satisfied that the teacher 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. Where concerns continue the appraiser should then call a meeting to discuss those concerns in line with Section 5.10.

Annual Assessment

Each teacher's performance will be formally assessed in respect of each appraisal period. In assessing the performance of the Headteacher, must consult the external adviser.

The teacher will receive a written appraisal report, which they will be given the opportunity to comment on as soon as practicable following the end of each appraisal period. The appraisal report will include:

- Details of the teacher's objectives for the appraisal period in question.
- An assessment of the teacher's performance of their role and responsibilities against their objectives, and against the relevant standards.
- An assessment of the teachers training and development needs and identification of any action that should be taken to address them.
- A recommendation on pay.
- A space for the teachers own comments.

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

Where Concerns Arise – Action Short of a Formal Procedure

Where concerns remain following the revision meeting prior to considering entering a teacher into formal capability, the teacher should be supported within the appraisal cycle. The objective is to provide support and guidance in such a way that the teacher's performance improves, and the problem is resolved.

If an appraiser identifies through the appraisal process, or via other sources of information that the difficulties experienced by a teacher are such that, if not rectified, could lead to formal capability procedures. The Appraiser, supported by HR at the request of the school, as part of the appraisal process will meet the teacher prior to invoking capability procedures to:

- Give clear written feedback to the teacher about the nature and seriousness of the concerns.
- Give the teacher the opportunity to comment on and discuss the concerns.
- Give the teacher at least 5 working days' notice that a meeting will be held to discuss targets for improvement alongside a programme of support.
- Inform the teacher that they have the right to be assisted by an independent representative. A representative may be a recognised trade union representative, trade union official or fellow worker. A HR representative may also be in attendance and at any future meetings where capability may be discussed.
- In consultation with the teacher at the above meeting, an action plan with support will be established (for example coaching, training, in-class support, mentoring, structured observations, visits to other classes or schools, or discussions with advisory teachers), that will help address those specific concerns.
- Make clear how progress will be monitored and when it will be reviewed.
- Explain the implications and process if insufficient or no improvement is made.

The teacher's progress will continue to be monitored as part of the appraisal process and a reasonable time given for the teacher's performance to improve. This will depend upon the circumstances but will normally be for a period of 4-8 weeks with an opportunity for an extension if required. Appropriate support will be provided as agreed in the Action Plan, so that the aim of recovering and improving performance can be achieved. During this monitoring period the teacher will be given regular feedback on progress and arrangements will be made to modify the support programme if appropriate.

If sufficient progress is made such that the teacher is performing at a level that indicates there is no longer a possibility of formal capability procedures being invoked the teacher should be informed of this at a formal meeting with the appraiser. Following this meeting the appraisal process will continue as normal.

If insufficient or no improvement has been made over this period, the teacher will be invited to a capability meeting to determine whether formal capability proceedings need to be commenced or the appraisal process remains in place. The teacher may be assisted by a recognised trade union representative, trade union official or fellow worker and will have at least 5 working days' notice of the capability meeting.

Transition to Capability

If a teacher demonstrates serious underperformance and has not responded to support provided within the appraisal process, the teacher will be invited, with at least five working days' notice, to a formal capability meeting by the Headteacher. The capability procedures will be conducted as detailed in the Capability Policy.

At this stage, the teacher will be informed that they will not receive any further pay progression until continued acceptable performance is achieved.

For more information refer to the School Capability Policy.

Retention of Records

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

Confidentiality and Professional Relationships

The appraisal process will be treated with confidentiality. Only the appraiser's line manager or, where there is more than one, each of the line managers will be provided with access to the appraisee's plan recorded in her/his statements. This will be done upon request and only where this is necessary to enable the line manager to discharge their responsibilities. Appraisees will be informed of requests for access to statements in the context of this policy.

In addition, the person responsible for CPD in school may require access to the sections of the appraisal records relating to CPD.

The process of gathering evidence for performance review will not compromise normal professional relationships between teachers. The Governing Board/Academy Committee/Board of Directors recognises that the appraiser will consult with, and seek to secure the agreement of, the appraisee before seeking information from other colleagues about the work of the appraisee.

However, the desire for confidentiality does not override the need for the Headteacher to quality-assure the operation and effectiveness of the appraisal system. The Headteacher might, for example, review all teachers' objectives and written appraisal records personally – to check consistency of approach and expectation between different appraisers. The Headteacher will need to be aware of the pay recommendations which have been made to conform with the statutory performance related pay requirements.

Anonymous information on the appraisal process and equality data will be shared with Ofsted during any inspection and with Governing Board to allow necessary checks on equality, fairness, consistency, and transparency of performance related pay.

Where a teacher invokes a pay grievance or is subject to capability proceedings, their appraisal statements and documents may be used as part of the evidence at the hearing to enable a fair judgement to be made. These documents are confidential to the hearing.

Sickness

If sickness absence appears to have been triggered by the commencement of monitoring within the appraisal process, the case will be dealt with in accordance with the school absence policy. The teacher may be referred immediately to the Occupational Health service to assess health and fitness for continued employment and the appropriateness or otherwise of continuing with monitoring or formal procedures. In some cases, following occupational health advice, it may be appropriate for a meeting to take place during a period of sickness absence. However, the views of the Occupational Health Physician will always be considered before a decision is reached.

The appraisal cycle must be completed before pay progression can be awarded. Therefore, sickness of this type places the appraisal cycle in suspension.

Where a teacher is absent due to long term absence such as sickness, maternity / additional paternity / adoption leave unrelated to the commencement of monitoring within the appraisal process this should be taken into account when setting the review periods to ensure they are reasonable.

Employees with Disabilities

In some cases, an individual may be unable to undertake the full duties of their post due to health-related reasons which may be a disability under the terms of the Equality Act 2010. The Equality Act 2010 defines that a person has a disability if they have a physical or mental impairment that has a substantial and long-term adverse effect on their ability to carry out normal day to day activities.

If an employee declares a disability or if the Headteacher is aware of a disability, the school ensure that all reasonable adjustments to the job, training and support have been provided before considering formal entry into capability. Any adjustment to the working conditions must be reasonable; Headteacher's are not expected to make unlimited provision for reasonable adjustments. Your HR provider should be consulted before any decision to enter the formal capability procedure.

Grievances

Where a member of staff raises a pay grievance (under the Schools' Pay Policy) during the appraisal process or a grievance (under the School's Grievance Policy) during the capability process, the appraisal or capability process may be suspended to deal with the grievance. Where the grievance and appraisal or capability cases are related it may be appropriate to deal with both issues concurrently.

Monitoring and Review

The Governing Body and Headteacher will review the operation and effectiveness of the school appraisal arrangements.

The Headteacher will provide the Governing Board with a written report on the operation of the school's Appraisal and Capability Policies annually. The report will not identify any individual by name. The report will include an assessment of the impact of these Policies on:

- Race
- Sex
- Sexual Orientation
- Disability
- Religion and Beliefs
- Age
- Part-time Status
- Maternity and Pregnancy

The Headteacher will report on whether there have been any appeals or representations on an individual or collective basis on the grounds of alleged discrimination.