

# Getting Started

A general overview of the appraisal module and how to set it up.

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The Appraisal module is also sometimes referred to as the Performance Management or Professional Development module.

The module manages an annual process where members of staff can have targets set and reviewed in a process involving them and an appraiser.

## Targets

Staff can have multiple targets but usually they will have three or perhaps four. For example teachers may have a target in each of the following areas:

- Pupil progress
- Teaching and Learning
- Professional Development

Leaders might have an alternative or additional "Leadership and Management" target relating to their particular area of responsibility.

It is possible to set up a number of different "Staff Types" e.g. Teacher, Head of Year, Site Staff etc. Each staff type can have a template targets to speed up the process of the initial meeting.

## Process

The appraisal process has four distinct phases:

1. Target setting
  - Targets are added individually or copied from the previous year or added from a template for the staff type
  - The member of staff (appraisee) would normally discuss and agree these in a meeting with the appraiser.
  - Each target must also have an entry for indicative evidence/success criteria and also for professional development needs (these can be marked as tbc or n/a if necessary)
  - The appraisee and the appraiser agree the targets on the system
2. Interim Review
  - Part way through the year, the appraisee and appraiser meet to conduct an interim review.

- Either of them can enter text into the interim comment for each target
  - When each target has an interim comment, both the appraisee and appraiser agree the interim review on the system.
3. Self review
- At the end of the year, the appraisee enters a self review of each target
  - When each target has a self review, the appraisee submits the self review and this notifies the appraiser that it is ready for final review.
4. Final review
- The appraiser enters a final review comment for each target and determines whether the target has been:
    - Met
    - Partially Met
    - Not Met
  - The appraiser adds further overall comments on:
    - Professional standards
    - Strengths
    - Areas for development
    - Summary
  - The appraisee adds a final comment
  - The appraiser completes the review

The review can be printed at any stage and when complete, a copy is emailed to both the appraisee and appraiser.

## Confidentiality

By its very nature, appraisals are confidential documents and generally are only accessible by the appraisee and appraiser.

However, the user or users assigned the role of "performance manager" can access all reviews unless they are marked as "confidential". This is helpful for the purposes of managing the process and quality assuring the targets against the school's requirements.

An individual review can be marked as confidential by the appraiser. If that is done then only the appraiser and appraisee can view it.

A whole "Staff Type" can be marked as confidential. This is useful for example for the appraisals of senior leaders where they shouldn't be visible to other senior leaders who may be managers of the system.