



# City of London Academies Trust

## Performance Management and Appraisal Policy

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## **1. Introduction**

- 1.1 All Trust employees are subject to performance appraisal arrangement and academies will ensure that all employees (including support staff) are briefed on the performance appraisal arrangement.
- 1.2 Pay progression for Trust employees on Trust terms and conditions of employment is based on performance as recorded in their annual appraisal.
- 1.3 TUPE staff are subject to the Trust's Performance Management Appraisal procedures, although pay progression is subject to TUPE contractual terms.
- 1.4 The performance appraisal policy and procedures follow the arrangements set out in The Education (School Teachers' Appraisal) (England) Regulations 2012.

## **2. Diversity Policy Statement**

- 2.1 The Trust willingly accepts, not only its legal responsibilities, but also wishes to embrace best practice in all areas of its work in order to secure equality of both treatment and outcome for all.

- 2.2 The Trust is committed to ensuring that no one is treated in any way less favourably on the grounds of personal differences such as race; national, ethnic or social origin; gender (including reassigned gender); sexual orientation; religious belief; age; disability; marital status; caring responsibilities or political or other personal beliefs.
- 2.3 We will implement all necessary action and training to ensure that the commitment of the Trust with regards to equality of treatment and outcome are fulfilled and will regularly monitor and review progress made in this respect.
- 2.4 We will ensure that employment and development opportunities are available to those who are, or who become, disabled on an equal footing with those without a disability, adapting jobs wherever possible to make them accessible.

This procedure should therefore be applied in accordance with this policy.

### **3. Purpose**

- 3.1 This policy sets out the framework for a clear and consistent assessment of the overall performance of all employees of the City of London Academies Trust including the central team, Academy Leaders (including the Principal, Headteacher, or Head of School) teachers and support staff in each academy and for supporting their development within the context of the Trust's plan for improving educational provision, the relevant Academy Improvement Plan and their own professional needs.
- 3.2 This policy should be read in conjunction with the Trust's Pay Policy.
- 3.3 Throughout this policy, unless indicated otherwise, all references to 'staff' include the Principal, Headteacher or Head of school.
- 3.4 For academy-based staff all appraisal activities will take place within directed time, and not within planning, preparation and assessment time.
- 3.5 As part of the overall implementation of the policy, the Trust will have consideration for workload impact.
- 3.6 All appraisers appointed will be suitably trained and for teachers will be qualified and have relevant teaching experience.
- 3.7 Appraisal at COLAT will be a supportive and developmental process designed to ensure that all staff have the skills and support they need to carry out their role effectively. It is intended to foster professional dialogue between colleagues and will help to ensure that all staff can continue to build on their professional development and that teachers are able to continue to improve their professional practice and to develop as teachers. There should be no surprises with regards to performance outcomes and the award of pay progression

### **4. Links to Academy improvement, Academy self-evaluation and Academy development planning**

- 4.1 The Academy improvement and development plan and the Academy's self-evaluation are key documents for the performance appraisal process.
- 4.2 All appraisers are expected to explore the alignment of appraisees' objectives with the Academy's priorities and plans. The objectives should also reflect appraisees' professional aspirations.

## **Performance appraisal procedures**

### **5. Appraisers**

- 5.1 The CEO will be appraised by the Trust Remuneration Committee (TRC) supported by a suitably skilled and experienced external adviser who has been appointed by the Trust Board for that purpose.
- 5.2 Members of the central team will be appraised by an appropriate line manager assigned by the Trust CEO.
- 5.3 The Principal/ Headteacher will be appraised by the Chair of Local Governing Body along with the Trust CEO, and where requested supported by a suitably skilled and experienced external adviser.
- 5.4 The choice of appraiser for other staff in each academy is for the Principal/ Headteacher to determine.
- 5.5 Where staff have an objection, for professional reasons, to the assigned appraiser, these objections should be put in writing to the Principal/ Headteacher who will carefully consider the objections. Where appropriate, an alternative appraiser will be offered, however the final decision is with the Principal/ Headteacher

The appraiser may be one of:

- The Principal/ Headteacher / Head of School
  - A member of the senior leadership team.
  - A teacher with a clear line management overview of a staff member (normally they will hold management responsibility)
  - A staff member specifically identified to undertake appraisal of other staff in the school
- 5.6 Where a member of staff has more than one-line manager, the Principal/ Headteacher will determine which line manager will be best placed to appraise the member of staff. It will be the responsibility of the line manager who is designated to act as appraiser to consult with other relevant line managers to gather additional information.
- 5.7 Where it becomes apparent that the appraiser will be absent for the majority of the cycle or is unsuitable for professional reasons, the Principal/ Headteacher may perform the duties or delegate them to another member of staff. Where this new appraiser is not the appraisee's line manager, the appraiser will have an equivalent or higher status in the staffing structure to the appraisee's line manager. In the event of an appraiser being changed, the performance appraisal cycle will not begin again.

### **6. Quality Assurance and Equality Legislation**

- 6.1 The Principal/ Headteacher will delegate the appraiser role for all teachers and support staff for whom they are not the Line Manager.
- 6.2 The Principal/ Headteacher is responsible for ensuring the appraisal process operates consistently, that objectives are focused on academy priorities and that they take account of the standards assessment.
- 6.3 All objectives will be referred to the Principal/ Headteacher to the commencement of the cycle of monitoring. Where there are concerns about the relevance of the objectives set, these concerns will be discussed with the appraiser and may require amendment following discussion with the employee.

- 6.4 Midyear reviews are to be diarised as part of the academy's annual cycle of events. It is the joint responsibility of the CEO and the Chair of the Local Governing Body to organise the midyear review of the Principal/ Headteacher.
- 6.5 The Principal/ Headteacher will moderate planning statements to check that the plans recorded in the statements of staff at the academy are consistent between those who have similar experience and similar levels of responsibility and comply with the Trust's Performance Appraisal Policy and the regulations and the requirements of equality legislation.
- 6.6 The CEO will have overall responsibility for ensuring the consistency and equality of application of the appraisal process throughout the Trust and may review a selection of completed appraisal forms from each academy as part of this quality assurance.
- 6.7 The Principal/ Headteacher will be responsible for reporting annually to the Local Governing Body Pay Committee (LGPC) on any relevant issues, including those of underperformance, arising from the annual review cycle and on any action required to address those issues. The report will enable members to receive an overall general view of the process but will not include specific details relating to individual members of staff.

## **7. Teacher Appraisal Process**

### **The appraisal period and overview**

- 7.1 The appraisal period will run for twelve months from 1 September to 31 August.
- 7.1.2 Assessment against the Teachers' Standards should start from the premise that all teachers are meeting the standards and they will be assessed as meeting the standards unless evidence to the contrary is provided. Assessment will be ongoing throughout the appraisal process and a final assessment will be completed at the year-end review meeting.
- 7.1.3 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 period will be determined by the duration of their contract.
- 7.1.4 Where a teacher starts their employment part way through a cycle, the Principal/ Headteacher shall determine the length of the first cycle for that teacher, with a view to bringing his or her cycle in line with the cycle for other teachers of the Trust as soon as possible.
- 7.1.5 The Local Governing Body will perform this same role for Principal/ Headteacher who starts his or her employment at an academy part way through a cycle.

### **Setting objectives**

- 7.2 The Principal/ Headteacher objectives will be set by the Chair of the Local Governing Body, and CEO and where requested in consultation with the external adviser. Objectives will be focused on key performance indicators, school priorities and take account of the relevant Headteacher standards.
- 7.2.1 Objectives for each teacher, including the Principal/ Headteacher, will be set before, or as soon as practicable after, the start of each appraisal period. The objectives set for each teacher will be linked to the relevant standards, will be Specific, Measurable, Achievable, Realistic and Time-bound (SMART) and

will be appropriate to the teacher's role and level of experience. Where numerical targets are used, where possible these should be agreed with the teacher, but in all cases must be reasonable, recognising that circumstances outside teachers' control may significantly affect success.

- 7.2.2 In setting the objectives, reviewers will have regard to what can reasonably be expected in the context of roles, responsibilities and experience, and taking into consideration work/life balance for all staff.
- 7.2.3 The appraiser and teacher will seek to agree the objectives but, if that is not possible, the appraiser will determine the objectives, and the teacher may record their comments in writing as an appendix to the appraisal statement. Objectives may be revised if circumstances change in consultation with the appraisee.
- 7.2.4 The objectives set for each teacher, including the Principal/ Headteacher, will, if achieved, contribute to the academy's plans for improving its educational provision and performance and improving the education of pupils at that academy.
- 7.2.5 Teachers will have a maximum of three performance objectives unless they are members of the senior team who will have a maximum of four.
- 7.2.6 Before, or as soon as practicable after the start of each appraisal period, each teacher will be informed of the standards against which that teacher's performance in that appraisal period will be assessed:
- All teachers will be assessed against the set of standards contained in the document called "Teachers' Standards".
  - Assessments for Headteachers will take into account the National Headteacher Standards of Excellence (2014).

## **Reviewing performance**

### **Observation**

- 7.3 The Trust believes that observation of classroom and leadership practice is important both as a way of assessing teachers' performance in order to identify any particular strengths and areas for development they may have and of gaining useful information which can inform academy improvement more generally.
- 7.3.1 All classroom observation will be carried out in a supportive fashion by those with QTS.
- 7.3.2 The frequency and conduct of such observations vary within agreed guidelines and are contained in the relevant academy's protocol.

### **Feedback and mid-year assessment**

- 7.3.3 Teachers will receive constructive feedback on their performance throughout the year and as soon as practicable after an observation has taken place or other evidence that has come to light. Feedback will include discussion with the teacher and will highlight particular areas of strength as well as any areas that need attention and will determine any appropriate action required.
- 7.3.4 A mid-year assessment may take place, where appropriate, to discuss areas of development and concern and support offered to the teacher as required.

- 7.3.5 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.

## **Annual assessment**

- 7.4 Each teacher's performance will be formally assessed in respect of each appraisal period.
- 7.4.1 In assessing the performance of the Principal/ Headteacher, the CEO and the Chair of the Local Governing Body will where there has been a request, consult the independent external adviser.
- 7.4.2 This assessment is the end to the annual appraisal process, but performance will be reviewed and addressed on a regular basis throughout the year. The teacher's objectives and performance against the teaching standards are the focus for the appraisal process and will therefore be the focus of the review.
- 7.4.3 Within two months of the end of each appraisal period, the teacher will receive – and can comment in writing on – a written appraisal report. Teachers will receive their written appraisal reports no later than 31 October and Headteachers/Principals will receive theirs no later than 30 November.

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 any relevant standards connected to these objectives;
  - an assessment of the teacher's training and development needs and identification of any action that should be taken to address them; and
  - a recommendation on pay progression in accordance with the Trust's Pay Policy.
- 7.4.4 The assessment of performance and of training and development needs will inform the planning process for the following appraisal period.
- 7.4.5 Any recommendations on pay progression in line with the Trust's Pay Policy will be referred to the Principal/ Headteacher before being referred on to the LGPC for ratification.

## **8. Support Staff Appraisal**

### **The appraisal period and overview**

- 8.1 The appraisal period for support staff will run for twelve months from 1 September to 31 August.
- 8.2 Appraisal will be a supportive and developmental process designed to ensure that all staff have the skills and support they need to carry out their role effectively.
- 8.3 Each member of staff will have an annual Performance Appraisal meeting with his or her line manager or appropriate manager.
- 8.4 It is essential that 1-1 meetings throughout the year support the appraisal process, through monitoring progress, providing an opportunity for constructive feedback and ensuring that the necessary support is provided for objectives to be achieved.
- 8.5 The procedure is intended to:

- identify the specific contributions support staff make so that they understand how their work contributes to the achievement of the academy and the Trust as a whole;
- provide a formal, recorded, regular review of an individual's performance, and plan for future development;
- reflect on their performance, so that staff are aware of what they have achieved or not achieved in the previous 12 months;
- identify individual learning, training and professional development needs and enable organisational training needs analysis and planning to take place;
- ensure staff are clear about the standards of performance expected;
- improve motivation, attitude and behavioural development, ensuring that all staff have a clear understanding of what is expected of them; and
- enable management and monitoring of standards, agreeing expectations and objectives, and delegation of responsibilities and tasks for all staff.

## **The Performance Appraisal Cycle**

### **The Annual Performance Appraisal Meeting**

- 8.6 At this meeting the previous year's performance will be jointly reviewed and new targets set for the following year. In addition, the learning and development plan will be considered and determined for the next year.
- 8.6.1 The individual staff member and appraiser will consider the evidence gathered and make a joint assessment of the levels of performance and attendance achieved by the individual. This discussion should focus on objective evidence and staff should expect to receive constructive as well as positive feedback.

### **Review of last 12 months**

- 8.7 Appraisers are asked to consider the achievement of individual team members. Achievements should be linked to stated targets as set out in the previous Performance Appraisal review, team, departmental and annual Academy Improvement Plan.
- 8.7.1 Members of staff should assess their own achievements, levels of performance and reflect on their development over the last year (by using the previous Performance Appraisal documentation). Each support staff member should be able to provide substantive and clear examples of their level of performance.

### **Setting Objectives and Targets for the Coming Year**

- 8.8 Objectives should be agreed between the manager and employee for the year ahead. The academy improvement plan as well as individual job roles will feed into individual objectives.
- 8.8.1 The number of objectives set (normally three) will depend on individual circumstances but should not exceed four. The agreed objectives will contain a description of what success may look like.
- 8.8.2 The learning and development needed to support the employee in achieving their objectives should be considered and detailed in the learning and development section of the appraisal form.

- 8.8.3 The appraisee should be given time to reflect before agreeing the 'performance targets'.
- 8.8.4 Once signed by the staff member and the manager the annual Performance Appraisal forms must be countersigned by the Principal/ Headteacher the original form belongs to the appraisee and is copied to the appraiser.

### **The Mid-Year Performance Appraisal Review**

- 8.9 The mid-year performance appraisal meeting will take place between February and March of the academic year. The mid-year review meeting will take place to ascertain both the individual's performance against targets and objectives. This is to ensure that the academy is fulfilling its obligations in terms of the individual's development through the implementation of the learning and development plan.
- 8.9.1 The appraisee should bring any relevant documentation/materials that would aid this process e.g. outcomes of courses attended, research findings, examples of resources made/used, etc.
- 8.9.2 It may be appropriate to redefine objectives or targets at this stage if priorities have changed.
- 8.9.3 A Performance Appraisal Review form is completed and signed as a record of this meeting.

### **9. Retention of statements**

- 9.1 The Principal/ Headteacher will ensure that all written appraisal records are retained in employee's Personnel files and destroyed in accordance with the Trust's Data Protection Policy.

### **10. Pay recommendations**

- 10.1 Pay progression for trust employees on trust terms and conditions of employment is based on their annual performance. Employees on TUPE terms will receive pay awards according to their contractual terms and conditions of employment.
- 10.2 The appraiser and Principal/ Headteacher must consider annually whether or not to increase the salary of eligible staff when assessing against their performance targets. Judgments will be properly rooted in evidence provided as part of the Performance Appraisal process.
- 10.3 Recommended pay decisions will be approved by the relevant pay committee, following recommendations from the CEO/Principal / Headteacher as set out in the Trust's Pay Policy, with reference to the appraisal reports and the pay recommendations they contain.
- 10.4 In the case of NQTs, whose appraisal arrangements are different, and pay decisions will be made by means of the statutory induction process <https://www.gov.uk/government/publications/induction-for-newly-qualified-teachers-nqts>
- 10.5 The written appraisal report at the end of the cycle is the only source of evidence required to support pay progression. There should be no surprises in this report. Employees can submit additional evidence if they choose and will not be penalised if they choose not to do so.

- 10.6 Decisions not to progress up the pay spine will only be made in circumstances where concerns about standards of performance have been raised in writing as part of the performance appraisal process and in line with the Trust pay policy.

**Clarification – this process must involve seeking the views of the appraisee, Head of Faculty and or other line managers before a decision is made.**

## **11. Right of appeal**

- 11.1 Appraisees have a right of appeal against the outcome of their appraisal.

### **Informal process**

- 11.2 If the member of staff is not satisfied with the outcome of their appraisal, they should seek to resolve this by discussing the matter informally with the decision maker within ten working days of receipt of the written appraisal report.

- 11.2.1 Where this is not possible or where the staff member continues to be dissatisfied, they may follow a formal appeal process.

### **Formal appeal process**

- 11.3 The staff member should set down in writing the grounds of appeal and send it to the person or committee who made the decision, within ten working days of the notification of the decision being appealed against or the outcome of the informal discussion referred to above.

- 11.3.1 Local HR are to make arrangements for an appeal hearing. The appeal will be heard by the LGPC members who will consider the appeal and give the staff member an opportunity to make representations in person. The relevant committee or person who made the original decision will also be present at the appeal hearing.

- 11.3.2 The staff member will be given five working days' notice of the appeal hearing and will be informed of their right to be accompanied by a representative of an independent trade union or workplace colleague.

- 11.3.3 Following the appeal hearing the employee must be informed in writing of the decision, within five working days of the appeal hearing.

## **12. Confidentiality**

- 12.1 Access to the written appraisal report will normally be limited to the appraisee, the appraiser, the Principal/ Headteacher or nominated member of the senior management team.

- 12.2 Members of SLT who are involved in the production and review of the CPD programme will have access to relevant parts of the appraisal documentation.

- 12.3 The whole performance appraisal process and the statements generated under it will be treated with strict confidentiality. Only the appraisee's Line Manager or, where they employee has more than one, each of their Line Managers will be provided with access to the appraisee's plan recorded in their statement, upon request, where this is necessary to enable the Line Manager to discharge their line

management responsibilities. Upon request, Appraisees will be informed who has requested and has been granted access.

## **Appendix A Procedure for conducting National Standards Assessment**

1. The 2012 Appraisal Regulations [Para 6 (a)] require Headteachers/Principals “to inform the teacher of the standards against which the teacher’s performance in that appraisal period will be assessed”. The aim of the assessment against national standards, as required by the regulations, will be to identify – through professional dialogue - the standards which represent the most appropriate areas for professional development for individual teachers in the forthcoming appraisal cycle.
2. It follows from this that the Trust needs to adopt a fair and evidence-based procedure for deciding whether or not standards are met; this will be carried out in line with this policy. The Headteacher/Principal has a key role to play in ensuring that judgments are consistent across each academy.
3. The key stages in informing the teacher of the standards against which the teacher’s performance in to be assessed are:
  - Teacher and appraiser will attend a 45-minute Professional Dialogue meeting. The aim of the meeting will be to agree the standards against which the teacher’s performance will be assessed in the next appraisal cycle.
  - Where there is agreement that all relevant standards are met, the teacher will identify the national standard(s) against which he or she would like to be assessed by means of the professional development objective.
  - Where examination of evidence at the Professional Dialogue meeting results in agreement that particular standards are not met, these standards will become those against which the teacher’s performance will be assessed in the next appraisal cycle.
  - Where teacher and appraiser cannot reach agreement on whether or not a standard is met, the matter will be referred to the Headteacher/Principal, who will meet with the teacher, consider all available evidence, and inform the teacher of his or her decision
  - A teacher dissatisfied with the Headteacher’s/Principal’s decision will have the right of appeal to the local governing body under existing procedures.
  - The objectives decided at or following the Professional Dialogue Meeting will form the basis of next year’s appraisal process.

## **Appendix B Observation of Teaching and Leadership Practice**

### **Purpose of Lesson Observations**

Lesson observations are developmental and supportive and those involved in the process will:

- carry out the role with professionalism, integrity and courtesy;
- seek to reach agreement in advance on how classroom observations are to be carried out; • evaluate objectively;
- report accurately and fairly; and
- respect the confidentiality of the information gained.

### **Formal Lesson Observations**

Teachers (other than those who are part of the support plan) will have lesson observations during the academic year. There is a maximum of three formal lesson observations for all teachers (except those on a targeted support and development programme).

For observations teachers will:

- Be consulted on the pattern of classroom observation which they can expect annually;
- Be notified at least five working days in advance of any observation;
- Have a reasonable amount of time between classroom observations, irrespective of the purpose of those observations;
- Only be observed by persons with qualified teacher status;
- Receive constructive oral and written feedback and support, in the context of professional dialogue between colleagues;
- Know the focus of the observation;
- Receive oral feedback as soon as possible after the observation and no later than the end of the following working day;
- Be given time for feedback for classroom observation outside of PPA time;
- Receive written feedback within five working days of the observation taking place, and
- Have the right to append written comments on the feedback document. No written notes in addition to the written feedback and teacher's comments will be kept.

An individual teacher is free to request that lesson observations be unannounced.

Appendix C Performance Management Form



Performance Management Record 20\_\_/\_\_

Name.....

Job Title.....

Meeting 1. Target Setting

1	
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2	
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3	
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4	
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Agreed by: Post Holder..... Line Manager..... Date ..../...../.....

Meeting 2. Interim Review

Notes of progress/development needs /opportunities and support required	Action who / when

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Agreed by: Post Holder..... Team Leader..... Date...../...../.....

*Meeting 3. Interim Review*

Notes of progress/development needs /opportunities and support required	Action who / when

Agreed by: Post Holder..... Line Manager..... Date...../...../.....

Objective	Met?	Comment
1.	<input type="checkbox"/> Met <input type="checkbox"/> Not Met	
2.	<input type="checkbox"/> Met <input type="checkbox"/> Not Met	
3.	<input type="checkbox"/> Met <input type="checkbox"/> Not Met	
4.	<input type="checkbox"/> Met <input type="checkbox"/> Not Met	

Tick as appropriate	Outstanding	Good	Requires improvement	Inadequate
Professional Standards				
Absence				
Punctuality				

Has this member of staff achieved their targets?	Yes		No	
Do you recommend this member of staff for pay progression?	Yes		No	

Objectives Review Statement – (Meeting 1 in following Cycle)

Overall Assessment of performance over the year

Post holder comments

Agreed by: Post Holder..... Appraiser..... Date ...../...../.....

Ratified by: Headteacher/Principal..... Date  
...../...../.....

This document must be completed by the team leader within 10 days of the review meeting, the post holder has a further 10 days in which to add comments. At the end of 20 days the original should be sent to HR and a copy given to the post holder.

## Performance Management Guidelines

### The Statutory Elements

- Review / objective setting meeting
- Two interim review meetings
- Observation (if necessary)
- Review meeting and pay progression recommendation

### Deadlines

- |  |                                |
|--|--------------------------------|
| 1. Review / objective setting meeting. | By the end of October annually |
| 2. Monitoring and Development meeting  | April annually                 |
| 3. Interim review meeting              | July annually                  |

### ***For Probationers – Trust Probationary Policy is to be followed***

1. *Objective Setting meeting* *Within two weeks of joining*  
*At three months, three-month review form*  
*At six months, sixth month review form, if confirmed in to post then step 2 onwards applies.*

### Review / objective setting meeting

#### Key Points

The first meeting should be developmental and provide an opportunity to:

1. Reflect on performance in a structured way
  2. Recognise achievements
  3. Discuss areas for development
  4. Discuss professional development
  5. Discuss objectives and overall performance in role
  6. Agree three/four new objectives
- The review/objectives statement should be concise with SMART targets.
  - It should be written and given to the member of staff within 10 days.
  - Staff have a further 10 days to write comments on the review document

***The original copy of last year's forms (where appropriate), as well as a copy of the front sheet, must be returned to HR by 1 November to ensure that records of objectives are kept and pay awards can be processed.***

Suggested timings and possible structure of target setting meetings

Agenda	Timing	Led by
Explanation of process	5 minutes	Line Manager
Discussion of role and responsibilities	10 minutes	Both
Discussion of strengths and areas for development. Review of previous objectives if appropriate.	10 minutes	Staff

Discussion of possible objectives and agreement on SMART targets	10 minutes	Both
Writing up objectives and recommendation for pay progression and any other awards	10 minutes	Staff