

APPRAISAL REVIEW MEETINGS

NEU Guidance for members in England and Wales

Preparing for a teacher appraisal review meeting is time well spent. This factsheet will help you prepare for your meeting.

What we say

When you read through this document you may have questions about what happens in your particular school or workplace and there may be collective issues that affect other members. In most circumstances, you should initially discuss the matter with your workplace rep, as they will know whether similar concerns have been raised by other members. If you do not have a rep at the moment, it would be a good idea to get members together to elect one. Further advice on this is available at:

<https://neu.org.uk/becoming-a-rep>

Although you may sometimes feel that you are the only person affected by or concerned about a particular issue, in reality this is seldom the case. Any difficulties you may experience are likely to be linked to wider conditions at your workplace and as a member of the NEU you have the advantage of being able to act collectively with your colleagues. This should give you the confidence of knowing that you have the weight of the Union behind you.

When should we meet?

Your school's appraisal policy will detail a timeframe within which all review meetings should take place. It is usual for all meetings to take place by 31 October (or 31 December for headteachers). Appraisal reviews must be completed before pay decisions are taken*. The DfE's pay advice states that decisions should be made "as quickly as is reasonably possible", noting that many schools have retained the former statutory deadlines of 31 October for classroom teachers and 31 December for leadership teachers. The appraisal review is an important meeting and so should not be scheduled at a time when you or your reviewer will feel under pressure to complete it quickly. Review meetings should **not** be scheduled during your PPA time.

*From 1 September 2020, teachers in Wales will not be subject to performance-based pay progression, instead progression will be based on the successful completion of a year of employment in the previous 12 months.

Where should we meet?

For the duration of the review meeting attention should be on you, so ideally there should be no external distractions (ie phone calls or visitors). We accept finding space within a school may be difficult, but the school should ensure suitable space is made available.

Who should attend the meeting?

Review meetings are confidential and so only you and your appraiser should be present. If your line manager is different to your appraiser then your appraiser should discuss the content of the review meeting with your line manager before or after the meeting as necessary.

How should I prepare for the review meeting?

You should look carefully at your objectives that were set at the start of the appraisal process. You should consider how you have performed against these objectives. You may wish to note down examples of how you think you have met particular objectives. You may also wish to consider what evidence you have to show you have met your objectives. You should review the feedback given to you following any classroom observation either by your appraiser or any other member of the management team. You should list your successes throughout the year even if these do not directly relate to your objectives. For example, this could include training you have received or given, or projects you have participated in. You should also consider what you wish to achieve during the upcoming year and what support, if any, you need to achieve your goals or aspirations. You should feel confident you can improve in areas where you believe you need improvement and consider how the school can help. You may wish to refer to the NEU's guidance on appraisals - <https://neu.org.uk/advice/appraisal>

What should I do if I have not met an objective?

You will need to look at the reasons why you have not met an objective. You may wish to use the following questions to help understand why you did not meet the objective:

- *Were you given the time or resources required to achieve the objective?*
- *Have priorities changed since the objective was set?*
- *Had you raised concerns when the objective was first set, and is this recorded on your review statement?*
- *Has the make-up of your class changed since the objective was set?*
- *Have you or your appraiser previously raised concerns that you were unlikely to meet the objective?*
- *If so, did you agree and implement an action plan to help you to achieve the objective and has this been followed?*
- *Have you received the support and guidance requested during the appraisal cycle to achieve this objective?*

The review meeting should hold no surprises for you and so any concerns your appraiser has over your performance should have been raised during the appraisal cycle. The DfE states this in its guidance to schools. How will the review meeting affect my pay? If you are eligible for progression then your reviewer must make a recommendation at the end of the review meeting as to whether you should progress on the pay range. You should be informed of this decision at the time. Your appraiser will make the recommendation as to whether or not you should progress, but this will usually need to be agreed by the governing body. However, NEU believes a recommendation to agree progression should not be overturned by the governing body without good reason.

Where should I go for further advice and support?

Your first point of contact for advice and support from the union is your National Education Union workplace representative. If there is no representative in your workplace, you should contact the relevant region using the details at <https://neu.org.uk/contact-us>.

Further Resources

NEU Appraisal Checklist, NEU/NAHT Model Appraisal Policy , NEU guidance on Setting of Objectives, NEU Classroom Observation Protocol and NEU guidance on Teachers' Standards, available from www.neu.org.uk.

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